13TH SEAGULL EDITION

# INTRODUCTION TO SOCIOLOGY

ANTHONY GIDDENS
MITCHELL DUNEIER
RICHARD P. APPELBAUM
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# Introduction to SOCIOLOGY

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Printed in Canada.

Editor: Michael Moss

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Composition: Graphic World

The Library of Congress has cataloged a previous edition as follows:

Names: Giddens, Anthony, author.

Title: Introduction to sociology / Anthony Giddens, London School of Economics, Mitchell Duneier, Princeton University, Richard P. Appelbaum, University of California, Santa Barbara, Deborah Carr, Boston University.

Description: Seagull 12e [edition] | New York : W.W. Norton & Company, [2021] | Includes bibliographical references and index.

Identifiers: LCCN 2020047531 | ISBN 9780393428216 (paperback) | ISBN 9780393537963 (epub)

Subjects: LCSH: Sociology.

Classification: LCC HM585 .G53 2021 | DDC 301--dc23 LC record available at https://lccn.loc.gov/2020047531

W. W. Norton & Company, Inc., 500 Fifth Avenue, New York, NY 10110

W. W. Norton & Company Ltd., 15 Carlisle Street, London W1D 3BS

Ebook version: 1.1-retailer

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# Preface

We wrote this book with the belief that sociology plays a key role in modern intellectual culture and occupies a central place within the social sciences. We have aimed to write a book that combines classic theories of sociology with empirically grounded studies and examples from real life that reveal the basic issues of interest to sociologists today. The book does not bring in overly sophisticated notions; nevertheless, ideas and findings drawn from the cutting edge of the discipline are incorporated throughout. We hope it is a fair and nonpartisan treatment; we endeavored to cover the major perspectives in sociology and the major findings of contemporary American research in an evenhanded, although not indiscriminate, way.

## MAJOR THEMES

The book is constructed around eight basic themes, each of which helps give the work a distinctive character. One of the central themes is the **micro and macro link**. At many points in the book, we show that interaction in micro-level contexts affects larger, or macro-level, social processes and that these macro-level processes influence our day-to-day lives. We emphasize that one can better understand a social situation by analyzing it at both the micro and macro levels.

A second theme is that of the **world in change**. Sociology was born out of the transformations that wrenched the industrializing social order of the West away from the ways of life that characterized earlier societies. The world created by these changes is the primary object of sociological analysis. The pace of social change has continued to accelerate, and it is possible that we stand on the threshold of transitions as significant as those that occurred in the late eighteenth and nineteenth centuries. Sociology has prime responsibility for charting the transformations of the past and grasping the major lines of development taking place today.

Another fundamental theme is the **globalization of social life**. For far too long, sociology has been dominated by the view that societies can be studied as independent and distinct entities. But even in the past, societies never really existed in isolation. In current times, we can see a clear acceleration in processes of global integration. This is obvious, for example, in the expansion of international trade across the world or the rapid spread of the deadly coronavirus disease around the globe. The emphasis on globalization also connects closely with the interdependence of the industrialized and developing worlds today.

The book also focuses on the importance of **comparative study**. Sociology cannot be taught solely by understanding the institutions of any one particular society. Although we have focused our discussion primarily on the United States, we have balanced it with a rich variety of materials drawn from other cultures. These include research carried out in other Western countries and in Russia and Eastern European societies, which are currently undergoing substantial changes. The book also includes much more material on developing countries than has been usual in introductory texts. In addition, we strongly emphasize the relationship between sociology and anthropology, whose concerns often overlap. Given the close connections that now mesh societies across the world and the virtual disappearance of many types of traditional social systems, sociology and anthropology have increasingly become indistinguishable.

A fifth theme is the necessity of taking a **historical approach** to sociology. This involves more than just filling in the historical context within which events occur. One of the most important developments in sociology over the past few years has been an increasing emphasis on historical analysis. This should be understood not solely as applying a sociological outlook to the past but as contributing to our understanding of institutions in the present. Recent work in historical sociology is discussed throughout the text and provides a framework for the interpretations offered in the chapters.

Throughout the text, particular attention is given to a sixth theme—issues of **social class, gender, and race**. The study of social differentiation is ordinarily regarded as a series of specific fields within sociology as a whole—and this volume contains chapters that specifically explore thinking and research on each subject (Chapters 8,

10, and 11, respectively). However, questions about gender, race, and class relations are so fundamental to sociological analysis that they cannot simply be considered subdivisions of the field. Thus, many chapters contain sections concerned with the ways that multiple sources of social stratification shape the human experience.

A seventh theme is that a solid grasp of **sociological research methods** is crucial for understanding the world around us. A strong understanding of how social science research is conducted is crucial for interpreting and making sense of the many social "facts" that the media trumpet.

The final major theme is the relationship between the **social and the personal**. Sociological thinking is a vital help to self-understanding, which in turn can be focused back on an improved understanding of the social world. Studying sociology should be a liberating experience: The field enlarges our sympathies and imagination, opens up new perspectives on the sources of our own behavior, and creates an awareness of cultural settings different from our own. Insofar as sociological ideas challenge dogma, teach appreciation of cultural variety, and allow us insight into the working of social institutions, the practice of sociology enhances the possibilities of human freedom.

# ORGANIZATION

Every chapter in the Thirteenth Seagull Edition follows the same structure, making it easier for students to study. Each chapter opens with an attention-grabbing question that challenges students' misconceptions about the topic.

Each chapter is broken down into four sections:

1. Basic concepts
2. Important theories
3. Current research
4. Unanswered questions

At the end of each section, students have the opportunity to test themselves with integrated "Concept Check" quizzes. The Thirteenth Seagull Edition also features "Big Picture" concept maps that integrate

the learning objectives, key terms, “Concept Checks,” and “Thinking Sociologically” activities into a handy one-stop review tool at the end of each chapter.

The chapters follow a sequence designed to help students achieve a progressive mastery of the different fields of sociology, but we have taken care to ensure that the book can be used flexibly and will be easy to adapt to the needs of individual courses. Chapters can be deleted or studied in a different order without much loss. Each has been written as a fairly autonomous unit, with cross-referencing to other chapters at relevant points.

In this edition, racial and ethnic categorizations are considered proper nouns and thus are capitalized. As Temple University journalism professor Lori Tharps notes, “Black with a capital B refers to people of the African diaspora. Lowercase black is simply a color” (Tharps, 2014). In the same way, “White” as a racial category acknowledges the functions of this label in society. Racial designations are not neutral markers of skin tone, but socially constructed categories whose meanings and boundaries shift over time and place. Treating these categories as proper nouns recognizes them as such (Appiah, 2020).

# WHAT’S NEW IN THE THIRTEENTH EDITION

All the chapters in the book have been updated and revised to reflect the most recent available research and data. Each chapter opens with a contemporary news event or social trend—ranging from the most local to the most global. These events are used to introduce and explain the key sociological concepts, themes, and studies that are elaborated on throughout the text.

**Chapter 1** **(What Is Sociology?):** A new introduction to the chapter discusses how the sociological imagination can be used to better understand major world events like the 2022 Russian invasion of Ukraine. This exploration continues into the “Conflict Theories” section, which includes an expanded discussion of how conflict theory can shed light on wartime violence in today’s world.

**Chapter 2 (Asking and Answering Sociological Questions):** In the section titled "A Recent Example of an Ethnography," a new discussion of Forrest Stuart's research for his book *Down, Out, and Under Arrest: Policing and Everyday Life in Skid Row* is introduced as an example of an ethnographer exploring the complex structural and interpersonal dynamics related to the policing of poverty. In the "Recent Example of an Experiment" section, an experiment that tried to determine the influence of gender on college students' evaluations of their professors has been added as a new example. In the "How Can Social Research Avoid Exploitation?" section, new findings are presented from community-based participatory research, a collaborative approach that equitably involves researchers and research subjects.

**Chapter 3 (Culture and Society):** New research on the effects of social media platforms like TikTok on the mental health of young people in China opens Chapter 3. The data in "The Global South" section have been updated to better reflect the anticolonial struggles faced by most countries in this conceptual region of the world (such as malnutrition, unstable economies, lack of education, low life expectancy, and substandard housing).

**Chapter 4 (Socialization and the Life Course):** The "Mass Media" section of Chapter 4 continues to explore the topic of social media usage with updates that reflect the ever-evolving relationship between technology and today's youth. The "Childhood" section has been updated with more current reports on the prevalence of child labor and child abuse to heighten the reader's awareness of the social problems that many children still suffer from today.

**Chapter 5 (Social Interaction and Everyday Life):** The "Audience Segregation and Sticky Reputations" section features new coverage of the relationship between online infamy and audience segregation. This section includes a new discussion of Forrest Stuart's *Ballad of the Bullet: Gangs, Drill Music, and the Power of Online Infamy*, which examines drill music in Chicago. In the "Faces, Gestures, and Emotion" section, the discussion of video-communication platforms has been updated to clarify the differences between face-to-face and electronic modes of communication today. The section titled "Social Life and the Ordering of Space and Time" has been streamlined to create space for updated research on technology's ability to connect disparate corners of the world

and distant points in time. The “What Happens When Dating Moves Online?” and the “To What Extent Can Electronic Communication Substitute for Face-to-Face Communication?” sections have both been updated with the most current research on the pros and cons of online dating and social communication today.

**Chapter 6 (Networks, Groups, and Organizations):** Updated research on internet access and social media usage rates in the United States is dispersed throughout this chapter. The information on remote work in the “How Are Late-Modern Organizations Reinventing Themselves?” section has been refreshed to reflect the ways in which business organizations are adopting more collaborative and flexible models of operation due to shifts in social communication in this technological age.

**Chapter 7 (Conformity, Deviance, and Crime):** The “What Is Deviance?” section has a new discussion of computer hacking as an illustration of the relationship between deviance and crime. The “Mass Incarceration” section features an updated exploration of the reasons for and costs of the United States producing a fifth of the world’s prisoners. The section also explores the ways that private companies profit from the large inmate population. The “Crimes of the Powerful” section includes a new discussion of Sam Bankman-Fried. Lastly, the “Mass Incarceration” section includes updated coverage of the particularly disastrous impact that this prison system has on Black communities, as African Americans make up over a third of all U.S. prisoners despite only comprising one-tenth of the country’s population.

**Chapter 8 (Stratification, Class, and Inequality):** This chapter begins with a new “pop quiz” and chapter opener about recent changes to the federal minimum wage. The “Systems of Stratification” section includes a new discussion of Isabel Wilkerson’s research on slavery, caste, and class systems. New data in the “Income” section parallels the steep rise in inequality today with how it was before the Great Depression. The “Wealth” section includes updated data on growing wealth disparities in the wake of the Covid-19 pandemic, followed by a new discussion in the “Education” section on how education impacts earnings. In the “Marx: Capitalism and the Analysis of Class” section, a new paragraph on communism in China explores class in socialist societies. Research and data updates on wealth, technology, and globalization have been added to the “Upper Class” section, including sociologist Rachel Sherman’s

research on the relationships between superrich people and their political parties. The “Middle Class” section includes a new discussion of how the recent shift toward remote work has impacted lower and middle-class people. In the “Poverty in the United States” section, new research on the impact of Covid-19 on poverty has been added, including a new figure that illustrates the dynamic between rising poverty rates and increasing economic growth. To follow, the “Why Are Poverty Rates Rising in the United States?” section introduces new research on the relationship between poverty and welfare. Lastly, the “How Will These Economic Patterns Affect Your Life?” section rounds out the chapter with additional coverage on the correlations between a person’s education, the occupation it affords them, the resulting income, and eventually, the likely trajectory of their economic future.

**Chapter 9 (Global Inequality):** The section titled “Is Global Economic Well-Being Improving?” includes updates on average incomes worldwide over the last 20 years. With that context, the “Research on Global Inequality Today” section reports that roughly one in nine people in the world suffers from chronic hunger as of 2022, mostly in the Global South.

**Chapter 10 (Inequality on the Basis of Gender and Sexuality):** Chapter 10 has been renamed due to new coverage of inequality on the basis of *sexuality* in addition to gender. In the “Basic Concepts” section, a new discussion on the distinctions between gender, sexual orientation, sex, and other related terms has been added to lay the foundation for further discussion of inequality on the basis of gender and sexuality. For example, in the “Research” section, a new discussion has been added to closely investigate inequality on the basis of sexual orientation in particular. The “Understanding Sex Differences: The Role of Biology” section includes updated research on the relationship between biology and gender roles, introducing new research on the differences in how biologically male and female adolescents show aggression. In the “Blurring the Boundaries Between the Genders” section, additional research shows that the number of persons in the United States who identify outside the male/female binary has risen drastically in recent years. The “Gendered Inequalities in Education: Unequal Treatment in the Classroom” section introduces new information from studies that show that little has changed in how male versus female characters are portrayed in texts, from the personal traits that are highlighted in each

gender to the paid occupations that each chooses. That section includes a new study on how Black boys are disproportionately more vulnerable to school suspension compared to other students. In the “Gendered Inequalities in the Workplace” section, research has been updated on the growing numbers of women working outside the home. Despite the rise in women’s workforce participation, this section also includes research showing that the family burdens placed on women during in the Covid-19 pandemic hindered their rising participation in the workforce. In the sections on occupational segregation, discussions of workforce disparities between women and men in tech professions and executive positions have been added. The “How Does Gender Inequality Affect Men?” section includes a new discussion on emerging research on the pressure transgender men feel to comply with hegemonic masculinity norms. The “Gender-Based Violence: Concepts and Patterns” section introduces new studies showing that rates of intimate partner violence are considerably higher for transgender couples than it is for others. To end this section, a new paragraph introduces research showing that the rates of sexual and nonsexual violence against transgender women and nonbinary persons have escalated in recent years at an alarming speed. The “Why Does Violence Persist? Competing Perspectives” section includes a new survey that indicates that rape victims are uniquely vulnerable to being blamed for other people attacking them. This same section includes new coverage of Russia’s violent attack on Ukraine, marked by sexual assault, torture, and kidnapping. The section also introduces new information showing that LGBTQ+ persons who are victims of sexual violence cannot report their attacks for fear of reprisal or even death because of the criminalization of same-sex relations. Lastly, a new paragraph in this section has been added detailing the UN’s 2016 resolution, which was adopted with the intention of taking action to end these fundamental assaults on human rights.

**Chapter 11 (Race, Ethnicity, and Racism):** The introduction to Chapter 11 offers new coverage of how continual changes to census categories underscore evolving conceptions of race and ethnicity in the United States. The “Institutional Racism” section includes new coverage of the Black Lives Matter movement, including discussion of the aftermath of George Floyd’s murder and research on the evidence for institutional racism in policing, including the 2023 report from the U.S. Justice Department on structural racism in the Minneapolis Police Department. In the “Overt Racism: Racism With Racists” section, prior

examples of blatant prejudice were updated with more recent crimes and incidents of overt racism. In the “Asian Americans” section, a new discussion explores the widespread diversity of ethnic experiences that the term “AAPI” tries to capture today, including the harms of the Asian American “model minority” myth. This section also has new coverage of the Page Act and the Chinese Exclusion Act, which outlawed Chinese immigration because of hostility from White Americans who viewed them as an economic threat, making way for a wave of racist crimes like lynching against Asian Americans across the United States. Another new paragraph explains how Asians today continue to experience discrimination and violence—exemplified by the significant rise in anti-Asian violence during the Covid-19 pandemic. The “Migratory Movements” section features a new discussion of changing migration trends over the last decade, including the increase in migrants to the United States from Central America. The “Educational Attainment” section includes a new discussion on the role of affirmative action policies at colleges and universities and the impact the recent Supreme Court decision will have on admissions policies and school diversity.

**Chapter 12 (Aging):** Chapter 12 opens with a revised “pop quiz” on the lifestyles of older adults. The “Graying of Society” section offers new coverage and updated data on how society designates who will care for older adults. In the “How Do People Age?” section, there is also new coverage on how and why older adults today are living longer than the generations before them. New information on the correlation between health and socioeconomic status in the United States has been introduced as well, accompanied by more data updates. New research on racial gaps in life expectancy has been added to the “Social Conflict” section. Similarly, in the “Life Course Frameworks” section, more research on the health of Black older adults has been added. In the “Subgroup Differences in Late-Life Poverty Rates” section, new coverage on older adults and financial crises has been added to the updated data. The “Social Isolation” section includes new research on gender and loneliness. Data have been updated in the “Ageism” section, supporting new coverage on how Covid-19 has intensified elder abuse. Further, in the “Unanswered Questions: The Social, Political, and Economic Impacts of Population Aging” section, new coverage has been added on societal changes due to population aging. To close the chapter, a new section on caregiver shortages ponders who will care for older adults

when they are unable to care for themselves and the workforce lacks enough caretakers to help.

**Chapter 13 (Government, Political Power, and Social Movements):** Chapter 13 opens with a new section on the Economic Intelligence Unit's annual Democracy Index—focusing specifically on where the United States falls in that ranking. In the "Democracy" section, additional historical context has been added to examine the rights of formerly enslaved people across various states, accompanied by an examination of participatory democracy. New introductions to representative democracy, liberal democracy, monarchy, constitutional monarchy, and authoritarianism follow. The "Global Rise of Populist Authoritarianism" section offers new coverage of populism and compares political participation in different counties. A new section, "Elections and Party Systems," examines the system of representation in the United States. Another new section titled "Political Parties and Party Preferences" provides historical context for politics in the United States, while "Political Participation in the United States" looks at the various ways for citizens to engage politically on a local level. A new section titled "The Political Participation of Women" highlights the historical limitations and recent advances of women in politics, and a new section called "Interest Groups, Money, and Politics" critiques the role of money in politics. In the "Role of Social Media" section, additional research on misinformation and community building online as it relates to politics has been added; and in the "Why Do Social Movements Occur?" section, additional research on collective action and social movement theory has been introduced. The "Nation-State, National Identity, and Globalization" section includes additional research that draws on Kenichi Ohmae's book *The End of the Nation State: The Rise of Regional Economies*, examining the irrelevance of borders in the information age. Lastly, a new section called "Why Is Voter Turnout So Low in the United States?" examines the historical roots of voter turnout, and another new section called "Is Social Media a Force for Democracy—or Demagoguery?" examines the role of social media in politics.

**Chapter 14 (Work and Economic Life):** This chapter begins with a new discussion of why the majority of global supply chain workers are women. The "Basic Concepts" section that follows examines how gender norms are perpetuated by the idea of housework. The "Types of Capitalism" section explores the rise of international media magnate

Rupert Murdoch's into power. The "Fordism and Scientific Management (Taylorism)" section introduces new information on surveillance in the workplace by artificial intelligence (AI). The "Informal Economy" section explores the dangers of dark web environments like the Hydra Market. In the "Twenty-First-Century Corporation: Different From Its Twentieth-Century Counterpart" section, an explanation of how Walmart cut workers off from union jobs and made dissatisfied and underpaid employees the norm is introduced, as well as an examination of China's advances in technology and government-supported industry. The section on labor unions—renamed "After Struggling to Be Effective, Are Labor Unions Rebounding?"—has been streamlined and updated to reflect how the power of labor unions has changed in recent years. In the "Unanswered Questions" section, Figure 14.4 on the rise of the service sector has been updated. Discussion of government concern over AI as a workforce disruptor has been added to the "Will Automation Make Things Better or Worse for Workers?" section. Similarly, in the "How Permanent Is Your Job Likely to Be?" section, discussion of the increasing rate of part-time and temporary employment compared to full-time permanent employment is now included.

**Chapter 15 (Families and Intimate Relationships):** Chapter 15 includes updates to figures and statistics. For example, in the "Family Formation and Dissolution Trends in the Contemporary United States" section, Figure 15.1, on median age at first marriage, has been updated; in the "Divorce and Separation" section, Figure 15.5 provides updated information on divorce rates in the United States; and throughout the whole chapter, there are updated statistics reflecting factors in contemporary family configurations, such as ethnicity, sexuality, age, wealth, and single parenthood. Coverage on the norms of sexual attractiveness for both males and females has been moved from the previous edition's gender chapter to this new edition's chapter on families and intimate relationships, where discussions of gender and sexuality intersect with those on intimacy and relationships. The relocation of this material about both gender and sexuality and intimate relationships allows for deeper discussion of how societal standards for attractiveness in intimate relationships are affected by one's gender and sexuality.

**Chapter 16 (Education):** The "Tracking and Within-School Effects" section includes new research from a study by sociologist Adam

Gamoran, who argues that tracking benefits advanced students who are predominantly privileged and White and reinforces previously existing inequalities for less advanced students who are predominantly underprivileged and of color. In the "Race and the 'Acting White' Thesis" section, new data reports changes in the achievement gap between various groups in recent years. Further, updated statistics indicating that more girls than boys enroll in a four-year college after high school can be found in the "Gender and Achievement" section. New information has been introduced in the homeschooling section that shows that the number of students who are homeschooled in the United States has doubled over the last two decades. The section also includes new research on parents' reasons for homeschooling, the most frequently cited being concern about the school environment, a desire to provide moral instruction, and a dissatisfaction with the academic instruction at other schools. Interestingly, additional research brought into the section indicates that White students have a higher homeschooling rate than Black or Hispanic students. In the section on who benefits from international education in the United States, updates have been made to data on the amount of money that foreign students contribute to the U.S. economy have.

Chapter 17 **(Religion in Modern Society):** This chapter opens with updated research on the prevalence of religious stereotypes in America, exploring new data that shows the rise in widespread negative stereotypes that many people in the United States harbor against Muslims. In the "Secularization: The Sociological Debate" section, updated data shows the ongoing geographic spread of Christianity from Europe and North America to the Global South. The "Religion in the United States" section includes updated data on the rise of people with no religious affiliation at all. Even with the decline in religious affiliation in the United States, the "Trends in Religious Affiliation" section confirms that most Americans still identify as Christian—with Jewish, Muslim, Buddhist, and Hindu people composing just 2 percent or less of the whole population. The "Catholicism" section includes data updates indicating that of the third of Americans born Catholic, two-fifths of them no longer identify with the Catholic Church. Lastly, the "Other Religious Groups" section has updated data showing that in the last decade over three-fifths of Jews have married non-Jews.

**Chapter 18 (The Sociology of the Body: Health, Illness, and Medicine):** Material previously included in this chapter on concepts related to sexuality and sexual orientation not directly related to health has been moved to the gender and sexuality chapter. The chapter opens with updated coverage of the multiple factors that contribute to a person's mental and physical health—including genetic makeup, their lifestyle choices, and their financial privilege. In the "Changing Conceptions of Health, Illness, and Medicine" section, new research is included on how death is highly medicalized and viewed as something to be fought or cured, how Covid-19 became the third-most-common cause of death among older adults in 2020 and 2021, and how the Clean Air Act in 1970 helped Americans breathe less pollution. Additional research has been added about the contemporary impacts of colonialism on global health in low-income countries in the "Colonialism and the Spread of Disease" section. New data about Covid-19 and sickness, focusing on patients who refused to receive vaccines and were maligned as responsible for their condition, can be found in the "Functionalist Perspectives: Sick Role Theory" section. In the "Research on Health, Illness, and Health Behaviors Today" section, new research on how mental health issues related to Covid-19 have affected teens and young adults has been incorporated. A new discussion has been added on vaccine hesitancy and the importance of health literacy in the "Social Class–Based Inequalities in Health" section. In the "Race-Based Inequalities in Health" section, new research on systemic racism has been introduced, explaining how racial inequalities have infiltrated and perpetuated inequality when it comes to health care access. A new discussion follows with new research suggesting that, despite having fewer socioeconomic resources than more privileged Whites, Hispanics prove at times to be healthier than them. In the "Gender-Based Inequalities in Health" section, additional research has been introduced showing that men are more likely than women to die of Covid-19; that newborn girls are more likely to survive Covid-19 than newborn boys; that women are more likely than men to report their health as fair to poor; and that men are less likely to report their depressive symptoms than women. In the "Childbirth" section, additional research on how women shoulder the burden of preventing pregnancy and how young people are delaying marriage and childbearing is introduced. The section on the efficacy of alternative versus mainstream medicine includes additional research showing that Americans have become frustrated with the expense of mainstream health care and are turning to complementary

and alternative medicine as a result. In the section titled “Are Eating Disorders Primarily a ‘Women’s’ Problem?,” additional research has been incorporated on how boys and young men also suffer from body image dissatisfaction; how young trans people also experience body dissatisfaction; and how cultural pressures around the body have lethal consequences linked with heart problems, depression, and other serious afflictions. A new section titled “Why Are Young People Today So Depressed and Anxious?” examines the latest data on the mental health of today’s youth, exploring why adolescents today suffer more from mental illness than previous generations did.

**Chapter 19 (Population, Urbanization, and the Environment):** Chapter 19 contains data and research updates throughout. The “Population Analysis: Demography” section reports that the infant mortality rate in the Central African Republic has lowered by about 10 people out of 1,000 in 2021. The “Dynamics of Population Change” section includes an updated world population growth rate, which lowered a bit from 2019 to 2022. The “Rise of the Megalopolis” section includes additional data indicating that rates of Covid-related deaths grew to be higher in more rural areas than in highly populated cities like New York, even though the virus struck the big cities first. The section on the decline of rural America includes data from a new source on how the consistently declining rural populations surprisingly grew throughout 2020–2021, as the pandemic motivated people to move to less populated areas. In the “Suburbanization” section, additional data on the increase of racial and ethnic diversity are introduced, showing that minorities constituted almost half of all suburban residents in 2020. The section on climate change reports that since China surpassed the United States as the world’s largest emitter of greenhouse gases in 2005, it now accounts for 32 percent of the world’s total (about double the U.S. share). It also reports the worrisome fact that the years from 2015 to 2023 were eight of the hottest years ever recorded. The “Food Security” section includes new estimates that about 828 million people were undernourished as of 2022, especially in sub-Saharan Africa, southeastern and western Asia, and Latin America. In the “Politics of Climate Change: National Action to Stop Global Warming” section, new coverage has been added on President Joe Biden’s 2021 executive order to reenter the United States into the Paris Agreement, thereby recommitting America to significantly reducing its dependency on fossil fuels. The “Sustainable Development Section” includes new research showing how Russia’s war on Ukraine

has caused a natural gas shortage in much of Europe, consequently postponing some countries' pledge to phase out nuclear power. A new survey has been introduced in this same section, reporting that from 2018 to 2021 the percent of young adults who were worried about global warming increased twice as much as the percentage of Americans 65 and older who reported that they were worried. Finally, in the "Will Global Population Outstrip Resources?" section, additional information shows that a significant portion of all the refugees and asylum seekers in 2022 were Ukrainians fleeing violence from Russia, closing this section with yet another wake-up call from the facts.

Chapter 20 **(Globalization in a Changing World):** A new quiz and chapter opener asks readers who they think is the most popular music artist in the world today, to begin a conversation about the prevalence of cultural globalization in our world. Accordingly, the "Cultural Globalization" section has been reworked and expanded, with new coverage of how modern communications technology has intensified globalization over the last half century, accelerated by the invention of social media. It revisits the chapter introduction, using pop music as an example of cultures borrowing and sharing ideas. The majority of the "Environmental Globalization" section, as well as the entirety of the "Political Globalization" section, has been replaced with new material on how the advent of technology has lessened the impact of physical environments on societies. This rewritten "Environmental Globalization" section includes a fresh definition of the term, framing it as the process of human actions affecting our environment. This definition flows easily into the next section, "Political Globalization," which is defined as the influence of international governmental institutions on the countries that ratify them. Expanded coverage appears on the European Union as a phenomenal example of member states relinquishing parts of their sovereignty to an elected overarching governing body. The section explains that the benefits of an arrangement such as the EU, especially the economic ones, provide enough incentive for countries to give up their economic independence.

# STUDY AIDS

Every chapter in the Thirteenth Edition of *Introduction to Sociology* includes the following features:

- **Learning Objectives** are outlined at the start of the chapter and then recur throughout the main text of the chapter at the beginning of the relevant sections to promote active learning.
- **“Concept Checks”** throughout each chapter help students assess their understanding of the major topics in the chapter. In each “Concept Check,” questions range from those that assess reading comprehension to those that require more advanced critical thinking skills.
- **“Big Picture”** concept maps at the end of every chapter, which integrate the learning objectives, key terms, and “Concept Checks” into a handy and visually interesting study tool, serve as both a pre-reading guide to the chapter and a post-reading review.

# ACKNOWLEDGMENTS

Many individuals offered us helpful comments and advice on particular chapters, and, in some cases, large parts of the text. They helped us see issues in a different light, clarified some difficult points, and allowed us to take advantage of their specialist knowledge in their respective fields. We are deeply indebted to them. Special thanks go to Sara Snitselaar, who worked assiduously to help us update data in all chapters.

We would like to thank the many readers of the text who have written us with comments, criticisms, and suggestions for improvements. We have adopted many of their recommendations in this new edition.

Jacob Avery, New Mexico Highlands University

Debjani Chakravarty, Utah Valley University

Miguel Centellas, University of Mississippi

Matthew Green, College of DuPage

Ashleigh Howard, Beaufort County Community College

Aida Isela Ramos, University of Mary Hardin-Baylor

Sarah Jakub, Bucks County Community College

Angela Jones, Farmingdale State College

Preethi Krishnan, Western Carolina University

Daniel Krymkowski, University of Vermont

Phil Lewis, University at Albany

Carlos López, Chemeketa Community College

Yang Lor, University of California, Merced

Minu Mathur, College of San Mateo

Ian Mullins, University of Virginia

Madeline Moran, Lehman College, CUNY

Jennifer Morrison, Richard Bland College of William & Mary

Brandie Pugh, Saint John's University

Evelyn Reynolds, Parkland College

Christina Sanchez Volatier, San Diego Mesa College

Ryan Steel, University of Minnesota

Amy Traver, Queensborough Community College

Elfriede Wedam, Loyola University Chicago

We have many others to thank as well. We are extremely grateful to senior project editor Linda Feldman, production manager Brenda Manzanedo, senior associate editor Anna Olcott, and editorial assistant Emma Freund for managing the myriad details involved in producing this book. Media editor Eileen Connell, associate media editor Alex Park, and assistant media editor Caleb Wertz deserve special thanks for creating all the rich materials, including the Norton Illumine Ebook, the InQuizitive course, test bank, videos, and other instructor-support materials that accompany the book. Cat Abelman painstakingly researched the best photos to grace these pages. Art director Rubina Yeh

and designer Marisa Nakasone showed exceptional flair and originality in designing and illustrating the book.

We are also grateful to our editors at Norton, Steve Dunn, Melea Seward, Karl Bakeman, Sasha Levitt, and Michael Moss, who have made many direct contributions to the various chapters and have ensured that we made reference to the very latest research. We would also like to register our thanks to a number of current and former graduate students—many of whom are now tenured professors at prestigious universities—whose contributions over the years have proved invaluable: Wendy Carter, Joe Conti, Francesca Degiuli, Audrey Devine-Eller, Neha Gondal, Neil Gross, Black Hawk Hancock, Dmitry Khodyakov, Paul LePore, Alair MacLean, Ann Meier, Susan Munkres, Josh Rossol, Sharmila Rudrappa, Christopher Wildeman, David Yamane, and Kathrin Zippel.

Anthony Giddens

Mitchell Duneier

Richard Appelbaum

Deborah Carr

# PART I The Study of Sociology

**We live in a world today that is increasingly complex. What makes this possible? Why are the conditions of our lives so different from those of earlier times? How will our lives change in the future? To what extent are things that seem natural actually socially constructed? Does the individual matter? These types of questions led to the study of sociology. As you read this text, you will encounter examples from different people's lives that will help answer these important questions.**

**In Chapter 1, we explore the scope of sociology and learn what insights the field can bring, such as the development of a global perspective and an understanding of social change. Sociology is not a body of theories everyone agrees on. As in any complex field, the questions we raise allow for different answers. In this chapter, we compare and contrast differing theoretical traditions.**

**Chapter 2 explores the tools of the trade and considers how sociologists do research. A number of basic methods of investigation are available to explore the social world. We must be sure that the information underlying sociological reasoning is as reliable and accurate as possible. The chapter examines the problems encountered when gathering such information and indicates how best to deal with them.**

# 1 What Is Sociology?

The Russia-Ukraine war is similar to wars of earlier centuries because

1. **it is about borders.**
2. **it relies heavily on ground forces.**
3. **it is a war between sovereign nations.**
4. **of all of the above.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

**LEARNING OBJECTIVES**

1. **Basic Concepts** Learn what sociology covers as a field and how everyday topics are shaped by social and historical forces. Recognize that sociology involves not only acquiring knowledge but also developing a sociological imagination.
2. **The Development of Sociological Thinking** Learn how sociology originated and understand the significance of the intellectual contributions of early sociologists.
3. **Modern Theoretical Approaches** Be able to identify some of the leading theorists and the concepts they contributed to sociology. Learn the different theoretical approaches modern sociologists bring to the field.
4. **How Can Sociology Help Us?** Understand how adopting a sociological perspective allows us to develop a richer understanding of ourselves and the world.

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On February 24, 2022, Russian president Vladimir Putin announced a "special military operation" and commanded his military forces to invade Ukraine. The invasion was condemned on moral grounds by countries far and wide, many of which imposed sanctions on Russia in an effort to support Ukraine without getting directly involved in the conflict. Before long, the war was leading to food shortages, higher gas prices, and inflation that affected people's lives far beyond the borders of these two countries.

Despite early predictions that the war would end quickly with a Russian victory, the Ukrainian army, equipped with billions of dollars of foreign aid and military equipment, achieved a string of battlefield successes that astonished the world. Over and over again, Ukrainian soldiers were able to ambush and pummel Russians, who were forced to retreat so quickly that they often abandoned their vehicles and armaments with no time to collect their dead. Everything was turning out very differently from what the Russian forces had been led to expect. One Russian volunteer wrote home to his mother, who wanted to know where she should send him a package:

> Mama, I'm in Ukraine. There is a real war raging here. I'm afraid. We are bombing all of the cities together, even targeting civilians. We were told they would welcome us, and they are falling under our armored vehicles, throwing themselves under the wheels and not

> allowing us to pass. They call us fascists. Mama, this is so hard. (Crilly, 2022)

Several minutes later he was killed.

Only a few weeks prior, many of the armed combatants on both sides had been enjoying lives that differed little from those of students or young people in the United States. They were dreaming about their future and engaging in carefree activities that those in their twenties have the luxury of enjoying before settling down with partners and families. In other words, they were going to raves, meeting friends for drinks by the river, or finding companions on dating apps.

The war disrupted the educational experience of students at Kyiv-Mohyla Academy.

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However, as Russian troops gathered at the Ukrainian border in early 2022, students at the Kyiv-Mohyla Academy were suddenly forced to come up with strategies to deal with an impending war. Gathering at a café decorated with old U.S. license plates, these college students exchanged stories, shared tricks on how to keep themselves calm, and discussed the need to carry international passports in case flight became the only option. One young woman, who had already contended with the Russian invasion of her native Crimea, described the division it had

caused in the local population, and the sudden shift in allegiances that she had experienced at school:

> We didn't have the Ukrainian language or history in our curriculum no longer. And I used to be in an English-speaking class, and we had American flags all over our room. And guess what? It was completely—I don't know how to say—it was painted all white. So America is now the biggest enemy of Russia and Ukraine as well. (Martin et al., 2022)

Like most young people in Europe, these Ukrainian students had no doubt felt like agents of their own destiny and had expected to continue enjoying a peace among nations that had always seemed natural to them. After all, they knew that most wars of the past had been driven by territorial disputes or expansion, a problem that, as many social scientists have argued, has become less relevant for modern societies that are simply too interdependent on a global scale to start fighting over long-fixed borders. Moreover, the recent wars with which they were familiar, such as those involving the United States and its allies in Iraq and Afghanistan, had relied on drone and massive air strikes that minimized the risk to armed forces on the ground. Yet now these students faced the possibility of experiencing, or even fighting in, a war that recalled those of the previous century.

Their fears proved correct, and by the end of that same year, reliable data suggested that the number of casualties had risen to 100,000 on both sides. In the meantime, the conflict had also had a devastating impact on the global economy and had raised the very real possibility of a nuclear confrontation between Russia and NATO states.

Although the war was the result of a dispute between two sovereign nations, it also illustrates how all local actions form part of larger social settings. Over the past half century, the connection between local and global has accelerated thanks to dramatic advances in communications, information technology, and transportation. Nearly all societies today are affected by globalization, the growth of world interdependence, on a daily basis. Indeed, sociological analysis that confines itself to the study of single societies has become increasingly archaic. As human beings are beset by fundamental global problems such as climate change and the threat of large-scale military confrontations, our fates are more intertwined than ever before.

The Russia-Ukraine war is but one of many worrisome social transformations that have upended expectations of a stable life. Today, more than at any time since most readers of this book were born, the world is awash with terrifying changes, often revealing that the conditions we have long regarded as natural are actually socially constructed.

In the two years before the war, for example, most readers of this book saw their day-to-day lives transformed by the Covid-19 pandemic. Though it cost many lives and ruptured many dreams, the crisis also made it clear that today we have the means to protect ourselves and control our destinies in ways unimaginable to earlier generations. And just as new mRNA technologies made it possible to develop effective vaccines for the disease at record pace, so too remote learning apps enabled schools and colleges to remain open when in-person classes were no longer feasible, setting new norms in place.

It is times like these, in fact, that give rise to a heightened consciousness. We all go through life with a certain limited perspective, but when we suddenly "take note," we start using what C. Wright Mills called the sociological imagination, a phrase he coined in his now-classic book of 1959 (Mills, 1959/2000). According to Mills, each of us lives in a very small orbit, and our worldview is limited by the social situations we encounter on a daily basis. These include the family and the small groups of which we are a part, the school we attend, and even the dorm in which we live. All these things shape our perspective and point of view. Yet the average person, Mills claims, doesn't really understand their personal problems or social situation as part of any kind of larger framework or series of goings-on. To overcome this limited perspective, we need a certain quality of mind that enables us to understand the larger meaning of our experiences, that is, a sociological imagination.

So, for example, whereas the on-campus U.S. college experience functioned to obscure the social and economic differences between students, the remote learning experience often allowed students in a Zoom class to note the social backgrounds of their peers, and thus to recognize differences in their home environments. This, in turn, enabled them to connect their individual experience to a conception of the larger social structure.

Many pressing questions about the world can be illuminated through sociological study. How did the present moment come about? Why are the conditions of our life so different from those of our forebears? How are the things that we take to be natural actually socially constructed? These questions are the promise and concern of sociology, a discipline that plays a fundamental role in modern intellectual culture.

# Glossary

globalization
: The development of social and economic relationships stretching worldwide.

sociological imagination
: The application of imaginative thought to the asking and answering of sociological questions. People who use the sociological imagination "think themselves away" from the familiar routines of daily life.

social structure
: The underlying regularities or patterns in how people behave in their relationships with one another.

# 1 BASIC CONCEPTS

**Learn what sociology covers as a field and how everyday topics are shaped by social and historical forces. Recognize that sociology involves not only acquiring knowledge but also developing a sociological imagination.**

The scope of sociological study is extremely wide, but in general, sociologists ask themselves certain questions that help focus the sociological imagination and provide them with the concepts that motivate research. Questions like these orient the discipline: How are the things that we take to be natural actually socially constructed? How is social order possible? Does the individual matter? How are the times in which we live different from those that came before?

## Social Construction

There is a basic flaw in human reasoning that goes something like this: The things that we see before us are inevitable. They are natural and cannot be changed. As the examples at the beginning of this chapter illustrate, what sociology teaches us is that, in many ways, the things we think are natural are actually created by human beings.

Another example comes from everyday experiences with sex and gender. A baby is usually born with either a penis or a vagina. Adults then use these sex characteristics to assign the baby to the gender category of girl or boy. This distinction is extremely important in our society since gender shapes how we interact with people. As such, a baby's sex is almost always the first thing you want to know before you interact with her. If you can't figure it out, you may ask the parents.

Is this true of any other characteristic? You usually don't need to know the race of a baby before interacting with them. And you don't need to know the economic class of a baby. Most babies today, regardless of their economic standing, are dressed in mass-produced clothes from stores such as Baby Gap or Target. In general, most parents do not try to signal the class of their baby with their garments. The same principle applies to

race and ethnicity. Some parents will dress their baby to affiliate with a certain race or ethnic group, but—except on holidays—this practice is less commonplace. Not as many people feel they need to know the race of a baby to interact with the infant.

Sex and gender are different. Many parents do not want someone coming up to their baby boy and asking, "Is it a boy or a girl?" To avoid this, they dress baby girls in pink and baby boys in blue. Some parents do not do this at the beginning—until they start getting asked that question. Then they start dressing their baby in a certain way in hopes that people will stop asking. This practice is a social construction, as there is nothing natural about girls wearing pink and boys wearing blue. In fact, up until the 1940s, blue was seen as a feminine color and pink was seen as a masculine color.

Like hairstyles and how we hold our bodies, clothing is part of gender. In U.S. society, gender is seen as reflecting sex. So when people ask, "Is it a boy or a girl?" they are implicitly asking, "Is this baby male or female?" Now, the fact that many people feel the need to know the sex of a baby suggests that we interact differently depending on whether we think the baby is female or male. If a baby is a boy, a person might walk up and say something in a traditional masculine style, such as "Hey, bud! How you doin'?" If a baby is a girl, the person might say something that is more appropriate for a little girl or more in keeping with the norms of traditional femininity, such as commenting on her clothing or saying she is cute. Eventually, we get to the point where these interactions start to mold the kind of person the baby becomes. Children come to see themselves as being either a boy or a girl. They start to move their bodies like a little girl or a little boy. They know that this is how others see them, and they know that when they go out into the world, they occupy the role of boy or girl. This happens through a process of interaction.

People interact differently with babies based on the baby's gender. How do sociologists analyze these interactions?

Even though it is not simply a natural occurrence that a person starts to behave as a girl or boy, many of us are raised to believe that the differences between women and men are purely biological. Sociologists disagree. Does this mean that sociologists want to dismiss the role of biology? No. The goal of sociology is not to try to teach you that the biological realm is a residual category with a minor role in explaining human behavior. One purpose of sociology is to disentangle what is biological from what is socially constructed. It is in part to try to determine how social phenomena relate to biological phenomena. Most sociologists admit that there is a place for the biological. However, many studies show that the things that the average person thinks are biological, and thus natural, are actually socially constructed. We will explore several of these issues in later chapters.

The more you start to think about disentangling what is natural from what is socially constructed, the more rigorously you will begin to think like a sociologist.

# Social Order

Before students were sent home in the spring of 2020 to learn remotely, the social order of a campus classroom was part of our routine experience. By 2022, many students who had become accustomed to online learning in high school or their first year of college were now faced with expectations associated with a lecture hall.

A professor looks out onto a lecture hall and sees a roomful of silent students taking notes and exhibiting self-control and discipline. There must be somebody in the room who wishes that he were doing yoga instead, or who would like to turn around and say something to a friend in the back. But the fact of the matter is that almost everyone appears to be doing the same thing: sitting quietly, listening, taking notes (or at least pretending to). How can we explain this orderly behavior? How can we explain the existence of social order in a lecture hall or in a society? We certainly need social order to get through the day, but how can we understand it?

Sociologists have offered up many different explanations to try to answer such questions. One explanation is that it is rational for individuals to act this way. Students know it is in their self-interest to sit quietly and pay attention. Perhaps a student hopes to apply to graduate school and wants to get a letter of recommendation from the professor. This goal motivates the student to respond to the classroom environment: The professor's willingness to write a letter is an incentive for good behavior. The recommendation acts as an incentive, stimulating the response of the student who wants it. The student tries to make a good impression, all the while keeping in mind that if she turns around and talks to the friend in the back week after week instead of listening, the professor might write an unflattering letter or refuse to write one at all. This explanation based on self-interest and incentives is what economists would use to explain most things. While some sociologists adopt such theories, most find such explanations to be based on an all-too-narrow conception of human nature. They therefore appeal to a different set of theories.

Thus, another explanation for social order is the existence of norms. It is a norm of social life that when students come into a classroom, they sit and take notes and pay attention. We learn and internalize norms as young people through a process called socialization. Once we have internalized a norm, we tend to follow through with the expectations of the norm in most of our interactions. Norms are important to sociologists

because they explain some of the ways in which we are inside society and, simultaneously, society is inside us.

Yet another explanation for social order focuses on beliefs and values. Perhaps students place a value on the classroom, on the university, or on higher education. If this is the case, then the social order upheld in classrooms is more than a norm. The lecture hall is a symbol of a greater whole, a sacred place that is part of a larger moral universe. Students sit quietly because they believe professors in this ceremonial order deserve respect, maybe even deference.

How do sociologists explain the typical orderly behavior in a lecture hall?

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It is important to keep in mind that we do not need to choose among these theories. Multiple factors can operate together. All these explanations address the question of social order from a sociological perspective. As such, the existence of social order is not taken for granted. For the average person, the question of social order arises in response to disruptions or breaks in that order. When students began doing remote learning during the Covid-19 pandemic, it was no longer necessary to look directly at the lecturer and pretend to be paying attention. Many students would turn their cameras off for long periods of time and the

professor could not know if someone was doing yoga while listening, or whether they were listening at all.

The average person who sees an event such as the attacks on the World Trade Center and the Pentagon on September 11, 2001, or the Sandy Hook school shooting on December 14, 2012, may ask, “How could this event have happened?” The sociologist reverses that question and instead asks, “How is it that disruptions in the social order do not happen more frequently?”

# Agency and Structure

A long-standing debate in the social sciences revolves around questions of free will and determinism. For example, a deterministic framework would predict that where an individual ends up in life is significantly, if not entirely, influenced by the position into which he is born. The sociological imagination can be quite deterministic in that it pushes us to see that, in many ways, the lives of individuals are quite determined by their social roles, gender, race, and class. Yet we would not want you to take away the lesson that individuals are trapped or controlled like puppets.

Take the example of college admissions. It is true that Ivy League graduates have a significantly higher average income than graduates of state-level schools. This difference in income would suggest that the college one attends is a crucial determinant of one’s success in later life. However, conventional studies looked only at students who had the same SAT scores and grades; they did not factor in other, personal characteristics that may have had an effect on later success in life.

In 2002, Alan Krueger and Stacy Dale published a study comparing the average yearly incomes of students who had attended an Ivy League college with those who had been admitted to an Ivy League school but chose to attend a state-level college instead. Despite an apparent disparity in opportunities for students who attended Ivy League versus non–Ivy League universities, Krueger and Dale discovered that the average salaries of the two groups of students were essentially the same. However, this study was extended and updated in 2011 and found that there were some notable exceptions to these outcomes. The 2011 study

found that for Black and Hispanic students from households with less-educated parents, earning degrees from Ivy League universities did matter (on capitalization of racial and ethnic groups, see preface). While the popular conception that attending elite institutions guarantees future success may not be true for all students, it does appear that racial and socioeconomic disparities do matter for some groups of students (Dale & Krueger, 2011; Gladwell, 2005; Krueger & Dale, 2002) .

Sociologists tend to think in probabilities. They look at the probabilities that people will end up in certain living situations on the basis of characteristics, de-emphasizing to some extent the power of the individual. However, the sociological imagination does leave room for the person to have an impact, even as we acknowledge that she is constrained.

Think about a girl from a working-class family whose parents have active sociological imaginations and a very deterministic understanding of their child's life chances. The parents did not go to college. Instead, they entered the workforce after high school, and they expect that their daughter will do the same. When the teenager tells her parents that she would like to go to college and be a lawyer, the parents might think of the probability of an individual from their class position achieving such a goal—how unlikely it is. They might tell their child to consider the odds against her and encourage her to pursue a different goal so that she will not be disappointed. What if she took this advice with a grain of salt and applied to college anyway? She would be no different from many of your classmates—and possibly even you. Many of you can think of people who started out just like this, with similar constraints, but who ended up in college due to their refusal to accept the odds as their fate.

# Social Change

Another question sociologists ask is how people live in light of the social transformations of their time. For today's generation of college students and their parents, these questions will revolve around whether the world will ever be the same after the Covid-19 pandemic, but questions about social change go back to the beginnings of the field of sociology.

In 1831, Alexis de Tocqueville, a French aristocrat and one of the first great social theorists, visited the United States from France. He wanted to understand how the conditions of democracy and equality were possible. Ever since the publication of his resulting study, *Democracy in America* (1835/1969), the United States has been viewed through the lens of sociology as a nation of joiners in which, more so than in Europe, people are involved in many groups and activities. Yet sociologists constantly revisit questions about whether the way we live today is different from how we lived in earlier times, and one of the enduring questions is whether Americans are less involved today in public-spirited activities than in the past.

Alexis de Tocqueville described nineteenth-century Americans as a nation of joiners. Is that still true?

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Another great theorist, Max Weber, in *The Theory of Social and Economic Organization* (1922/1947), looked at the way the world had been changing due to the influence of massive large-scale organizations, and how the emergence of an organizational society and large bureaucratic organizations had changed and transformed social life. Karl Marx, in *Capital* (1867/1977), examined how industrialization had changed the structure of an entire society, transforming the relationships of individuals to their work and to one another from feudalism to capitalism. Émile Durkheim, in *The Division of Labor in Society*

(1893/1964), discussed how the historical changes wrought by industrialization and urbanization had led to the increasing specificity of the roles individuals filled, and how this specialization functioned to benefit society as a whole. These sound like abstract topics, but they were central to understanding how the world was changing at particular times.

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**CONCEPT CHECKS**

1. **What is the sociological imagination, according to C. Wright Mills?**
2. **How does sociology help us disentangle what is biological from what is socially constructed?**
3. **How does the concept of social structure help sociologists better understand social phenomena?**

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# Glossary

social construction
: An idea or practice that a group of people agree exists. It is maintained over time by people taking its existence for granted.

socialization
: The social processes through which children develop an awareness of social norms and values and achieve a distinct sense of self. Although socialization processes are particularly significant in infancy and childhood, they continue to some degree throughout life. No individuals are immune from the reactions of others around them, which influence their behavior at all phases of the life course.

# 2 THE DEVELOPMENT OF SOCIOLOGICAL THINKING

**Learn how sociology originated and understand the significance of the intellectual contributions of early sociologists.**

When students start studying sociology, many are puzzled by the diversity of approaches they encounter. Indeed, sociologists often disagree about how to study human behavior and how best to interpret research results. Why is this? Why can't sociologists agree more consistently, as natural scientists seem to do? The answer is bound up with the very nature of the field. Sociology is about our lives and our behavior, and studying ourselves is the most complex endeavor we can undertake. To understand this complexity, sociologists are guided by the four questions we've discussed: How are the things we take to be natural actually socially constructed? How is social order possible? Does the individual matter? How are the times in which we live different from those that came before?

## Early Theorists

### Auguste Comte

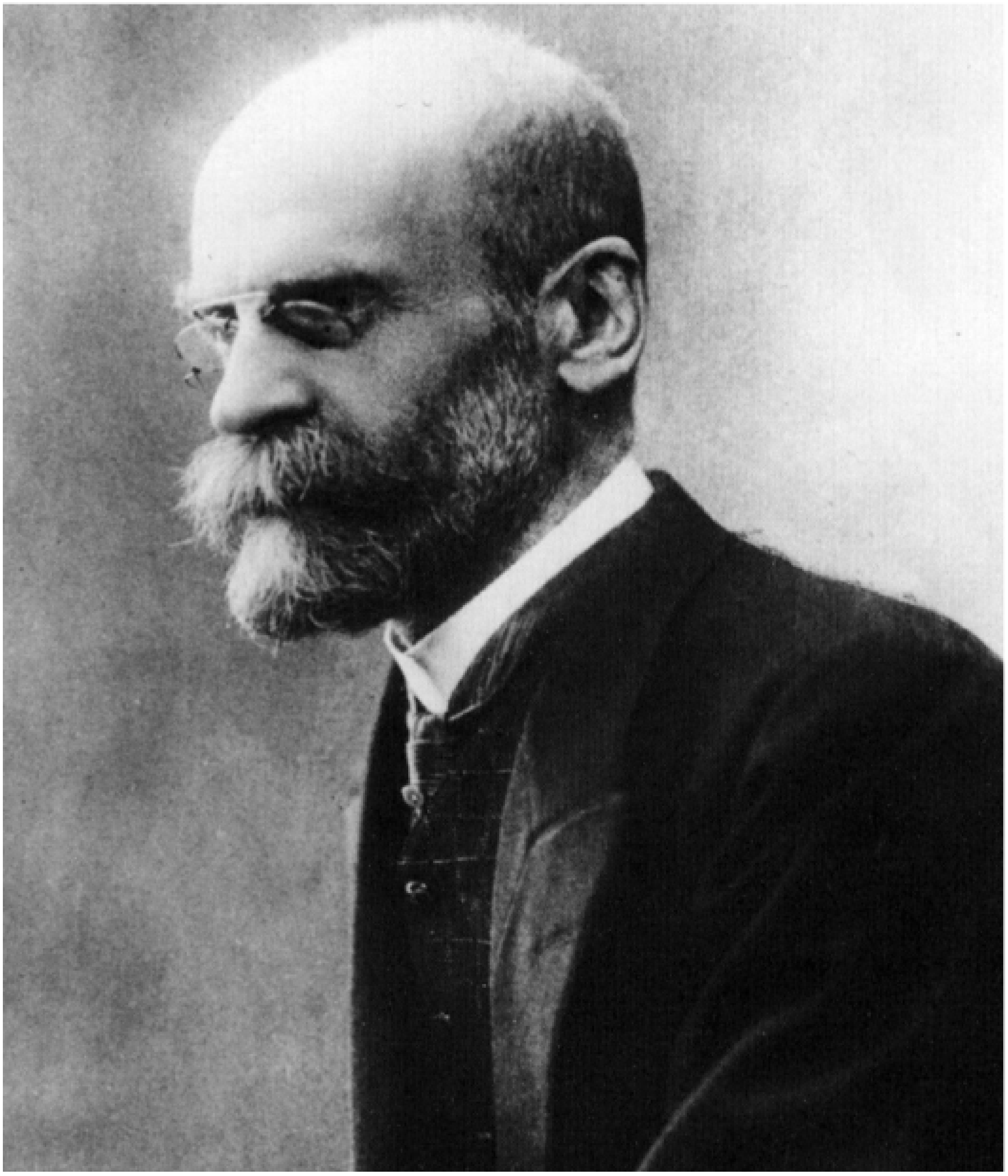
Auguste Comte (1798–1857)

The French philosopher Auguste Comte (1798–1857) invented the word *sociology* to describe the discipline he wished to establish. Comte believed that the scientific method could be applied to the study of human behavior and society, and that this new field could produce knowledge of society based on scientific evidence. Comte believed that sociology, as the scientific study of social life, should model itself after physics; he initially called the subject *social physics*, a term that many of his contemporaries used. Comte also felt that sociology should contribute to the welfare of humanity by using science to predict and control human

behavior. His ideas about social planning were predicated on an understanding that society and the social order are not natural or preordained by a divine power, but rather constructed by individuals. Later in his career, Comte drew up ambitious plans for the reconstruction of French society in particular, and for human societies in general, based on scientific knowledge. The question of whether sociologists should seek to serve humanity with their work is one that sociologists still ask.

## Émile Durkheim

Although Émile Durkheim (1858–1917) drew on aspects of Comte's work, he thought that many of his predecessor's ideas were too speculative and vague and that Comte had not successfully carried out his program—to establish sociology on a scientific basis. To have a scientific basis, according to Durkheim, sociologists must develop methodological principles to guide their research. Sociology must study social facts—aspects of social life that shape our actions as individuals, such as the state of the economy or the influence of religion. Durkheim's famous first principle of sociology was "Study social facts as things!" By this principle, he meant that social life can be analyzed as rigorously as objects or events in nature.



Émile Durkheim (1858–1917)

Like a biologist studying the human body, Durkheim saw society as a set of independent parts, each of which could be studied separately. These ideas drew on the writings of Herbert Spencer, who also likened society to a biological organism. Each of a body's specialized parts—such as the brain, heart, lungs, and liver—contributes to sustaining the life of the organism. These specialized parts work in harmony with one another; if they do not, the life of the organism is threatened. So it is, according to Durkheim, with society. For a society to endure over time, its specialized institutions—such as the political system, the economy, the family, and the educational system—must function as an integrated whole. Durkheim

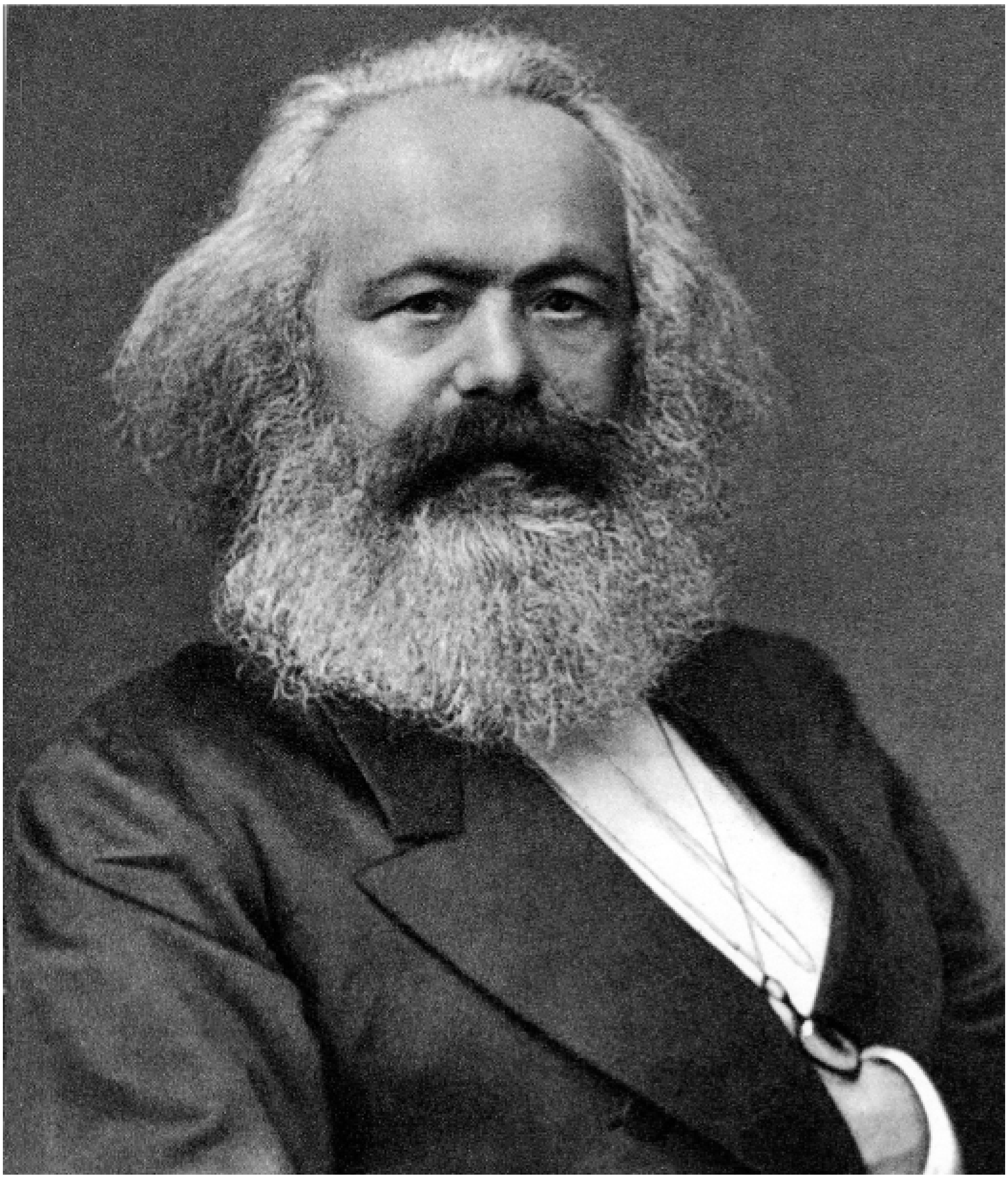
referred to this social cohesion as organic solidarity. He argued that the continuation of a society depends on cooperation, which presumes a general consensus among its members regarding basic values and customs.

Another theme pursued by Durkheim, and by many others since, is that societies exert social constraint over their members' actions. Durkheim argued that society is far more than the sum of individual acts; when we analyze social structures, we study characteristics that have a "firmness" or "solidity" comparable to those of structures in the physical world. Think of a person standing in a room with several doors. The structure of the room constrains the range of the person's possible activities. The position of the walls and doors, for example, defines routes of exit and entry. Social structure, according to Durkheim, constrains our activities in a parallel way, limiting what we can do as individuals. It is "external" to us, just as the walls of the room are.

Durkheim's analysis of social change was based on the development of the division of labor; he saw it as gradually replacing religion as the basis of social cohesion and providing organic solidarity to modern societies. He argued that as the division of labor expands, people become more dependent on one another because each person needs goods and services that those in other occupations supply.

Another of Durkheim's famous studies (1897/1966) analyzed suicide. Although suicide seems to be a personal act, the outcome of extreme personal unhappiness, Durkheim showed that social factors such as anomie—a feeling of aimlessness or despair provoked by modern social life—influence suicidal behavior. Suicide rates show regular patterns from year to year, he argued, and these patterns must be explained sociologically. According to Durkheim, processes of change in the modern world are so rapid and intense that they give rise to major social difficulties, which he linked to anomie. Traditional moral controls and standards, formerly supplied by religion, largely break down under modern social development, and this breakdown leaves many individuals feeling that their lives lack meaning. Durkheim later focused on the role of religion in social life. In his study of religious beliefs, practices, and rituals, *The Elementary Forms of Religious Life* (1912/1965), he explored the importance of religion in maintaining moral order in society.

## Karl Marx



Karl Marx (1818–1883)

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Karl Marx (1818–1883)—a German economic, political, and social theorist—also sought to explain social changes arising from the Industrial Revolution; however, his ideas contrast sharply with those of Comte and Durkheim. When he was a young man, his political activities brought him into conflict with the German authorities; after a brief stay in France, he settled in exile in Britain. Much of his writing focuses on economic issues, but because he was concerned with connecting economic problems to social institutions, his work is rich in sociological insights.

Marx's viewpoint was founded on what he called the materialist conception of history. According to this view, it is not the ideas or values human beings hold that are the main sources of social change, as Durkheim claimed. Rather, social change is prompted primarily by economic influences. The conflicts between classes—rich versus poor—provide the motivation for historical development. In Marx's words, "All human history thus far is the history of class struggles."

Though he wrote about various phases of history, Marx concentrated on change in modern times. For him, the most important changes were bound up with the development of capitalism. Those who own capital—factories, machines, and large sums of money—form a ruling class. The mass of the population makes up a class of wage workers, a working class, who do not own the means of their livelihood but must find employment provided by the owners of capital. Capitalism is thus a class system in which conflict is inevitable because it is in the interests of the ruling class to exploit the working class and in the interests of the workers to seek to overcome that exploitation.

According to Marx, in the future, capitalism will be supplanted by a society with no divisions between rich and poor. He didn't mean that all inequalities would disappear. Rather, societies will no longer be split into a small class that monopolizes economic and political power and a large mass of people who benefit little from the wealth their work creates. The economic system that will develop in response to capitalist conflict will be characterized by communal ownership and will lead to a more equal society than we know at present.

Marx's work had a far-reaching effect on the twentieth-century world. Until the fall of Soviet communism at the end of the twentieth century, more than a third of the earth's population lived in societies whose governments derived inspiration from Marx's ideas. In addition, many sociologists have been influenced by Marx's ideas about class divisions.

## Max Weber

Max Weber (1864–1920)

Like Marx, the German-born Max Weber (pronounced “Vay-ber”; 1864–1920) cannot be labeled simply a sociologist, because his interests spanned many areas. His writings covered the fields of economics, law, philosophy, and comparative history as well as sociology, and much of his work also dealt with the development of modern capitalism. He was influenced by Marx but was also critical of some of Marx’s major views. For instance, he rejected the materialist conception of history and saw class conflict as less significant than Marx did. In Weber’s view, economic factors are important, but ideas and values have just as much effect on social change.

Some of Weber's most influential writings analyzed the distinctiveness of Western society compared with other major civilizations. He studied the religions of China, India, and the Near East, thereby making major contributions to the sociology of religion. Comparing the leading religious systems in China and India with those of the West, Weber concluded that certain aspects of Christian beliefs had strongly influenced the rise of capitalism. He argued that the capitalist outlook of Western societies had not emerged, as Marx supposed, only from economic changes. In Weber's view, cultural ideas and values shape society and affect individual actions.

One of the most persistent concerns of Weber's work was the study of bureaucracy. A bureaucracy is a large organization that is divided into jobs based on specific functions and staffed by officials ranked according to a hierarchy. Industrial firms, government organizations, hospitals, and schools are examples of bureaucracies. Weber saw the advance of bureaucracy as an inevitable feature of our era. Bureaucracy enables large organizations to run efficiently, but at the same time, it poses problems for effective democratic participation in modern societies. Bureaucracy involves the rule of experts who make decisions without consulting those whose lives are affected by these decisions.

**Table 1.1 INTERPRETING MODERN DEVELOPMENT**

| | | |
|---|---|---|
| **DURKHEIM** | 1. | The main dynamic of modern development is the **division of labor** as a basis for social cohesion and **organic solidarity**. |
| | 2. | Durkheim believed that sociology must study **social facts** as things, just as science would analyze the natural world. His study of suicide led him to stress the influence of social factors—qualities of a society external to the individual—on a person's actions. Durkheim argued that society exerts **social constraint** over our actions. |
| **MARX** | 1. | The main dynamic of modern development is the |

| | | |
|---|---|---|
| | | expansion of **capitalism**. Rather than being cohesive, society is divided by class differences. |
| | 2. | Marx believed that we must study the divisions within a society that are derived from the economic inequalities of capitalism. |
| **WEBER** | 1. | The main dynamic of modern development is the **rationalization** of social and economic life. |
| | 2. | Weber focused on why Western societies developed so differently from other societies. He also emphasized the importance of cultural ideas and values in social change. |

Some of Weber's writings also address the character of sociology itself. He was more cautious than either Durkheim or Marx in proclaiming sociology to be a science. According to Weber, it is misleading to imagine that we can study people by using the same procedures that physicists or biologists use to investigate the natural world. Humans are thinking, reasoning beings; we attach meaning and significance to most of what we do, and any discipline that deals with human behavior must acknowledge this fact.

# Historically Neglected Founders

Durkheim, Marx, and Weber are widely acknowledged as foundational figures in sociology, yet other important thinkers from the same period made valuable contributions to sociological thought as well. Very few women or Black people were given the opportunity to become professional sociologists during the "classical" period of the late nineteenth and early twentieth centuries. However, their contributions are recognized widely today and have had a major influence on

contemporary sociologists. Two of the most influential writers were Harriet Martineau and W. E. B. Du Bois.

## Harriet Martineau

Harriet Martineau (1802–1876)

Harriet Martineau (1802–1876), born and educated in England, has been called the “first woman sociologist.” As with Marx and Weber, her interests extended beyond sociology. She was the author of more than 50

books, as well as numerous essays, and was an active proponent of women's rights and the abolition of slavery. Martineau is now credited with introducing sociology to England through her translation of Comte's founding treatise of the field, *Positive Philosophy* (Rossi, 1973). Additionally, she conducted a systematic study of American society during her extensive travels throughout the United States in the 1830s, which is the subject of her book *Society in America* (1837/1962).

Martineau is significant to sociologists today for several reasons but in particular for her methodological insight. First, she argued that when one studies a society, one must focus on all its aspects, including key political, religious, and social institutions. Second, she insisted that an analysis of a society must include all its members, a point that drew attention to the conspicuous absence of women's lives from the sociology of that time. Third, she was the first to turn a sociological eye on previously ignored issues and institutions, including marriage, children, domestic and religious life, and race relations. Finally, like Comte, she argued that sociologists should do more than just observe; they should also act in ways that benefit society.

## W. E. B. Du Bois

W. E. B. Du Bois (1868–1963)

W. E. B. Du Bois (1868–1963) was the first African American to earn a doctorate from Harvard University. Among his many contributions to sociology, perhaps most important is the concept of "double consciousness," a way of talking about identity through the lens of the experiences of African Americans (Morris, 2015). Du Bois argued that American society lets African Americans see themselves only through

the eyes of others: “It is a particular sensation, this double consciousness, this sense of always measuring one’s soul by the tape of a world that looks on in amused contempt and pity. One ever feels his two-ness—an American, a Negro, two souls, two thoughts, two unreconciled strivings, two warring ideals in one dark body, whose dogged strength alone keeps it from being torn asunder” (1903). Du Bois made a persuasive claim that one’s sense of self and one’s identity are greatly influenced by historical experiences and social circumstances—in the case of African Americans, the effect of slavery, and, after emancipation, segregation and prejudice.

Throughout his career, Du Bois focused on race relations in the United States; as he said in an oft-repeated quote, “The problem of the twentieth century is the problem of the color line” (Du Bois, 1903). His influence on sociology today is evidenced by continued interest in the questions he raised, particularly his concern that sociology must explain “the contact of diverse races of men” (Du Bois, 1903). Du Bois was also the first social researcher to trace the problems faced by African Americans to their social and economic underpinnings, a connection that most sociologists now widely accept. Finally, he connected social analysis to social reform. He was one of the founding members of the National Association for the Advancement of Colored People (NAACP) and a longtime advocate for the collective struggle of African Americans.

Later in his life, Du Bois became disenchanted by the lack of progress in American race relations. He moved to the African nation of Ghana in 1961 when he was invited by the nation’s president, Kwame Nkrumah, to direct the *Encyclopedia Africana,* a government publication in which Du Bois had long had an interest. He died in Ghana in 1963. Although Du Bois receded from American life in his later years, his impact on American social thought and activism has been particularly profound, with many ideas of the Black Lives Matter movement informed by his writings (Morris, 2015).

# Understanding the Modern World: The Sociological Debate

From Marx’s time to the present, many sociological debates have centered on Marx’s ideas about the influence of economics on the development of modern societies. According to Marx, the stimulus for

social change in the modern era resides in the pressure toward constant economic transformation produced by the spread of capitalist production.

Capitalism is a vastly more dynamic economic system than any other that preceded it. Capitalists compete to sell their goods to consumers; to survive in a competitive market, firms must produce their wares as cheaply and efficiently as possible. This competition leads to constant technological innovation because increasing the effectiveness of the technology used in a particular production process is one way in which companies can secure an edge over their rivals. There are also strong incentives to seek new markets in which to sell goods, acquire inexpensive raw materials, and make use of cheap labor power. Capitalism, therefore, according to Marx, is a restlessly expanding system pushing outward across the world. This is how Marx explained the global spread of Western industry.

Subsequent Marxist authors have refined Marx's portrayal. However, numerous critics have set out to rebut Marx's view, offering alternative analyses of the influences shaping the modern world. Virtually everyone accepts that capitalism has played a major part, but other sociologists have argued that Marx exaggerated the effect of purely economic factors in producing change and that capitalism is less central to modern social development than he claimed. Most of these writers have also been skeptical of Marx's belief that a socialist system would eventually replace capitalism.

One of Marx's earliest and most acute critics was Max Weber, whose alternative position remains important today. According to Weber, noneconomic factors have played the key role in modern social development. Weber's celebrated work *The Protestant Ethic and the Spirit of Capitalism* (1904/1977) proposes that religious values—especially those associated with Puritanism—were of fundamental importance in creating a capitalistic outlook. This outlook did not emerge, as Marx had supposed, only from economic changes.

Weber's understanding of the nature of modern societies, and the reasons for the spread of Western ways of life across the world, also contrasts substantially with that of Marx. According to Weber, capitalism—a distinct way of organizing economic enterprise—is one among other major factors shaping social development in the modern period. Underlying these capitalist mechanisms, and in some ways more

fundamental than those mechanisms, is the effect of science and bureaucracy. Science has shaped modern technology and will presumably do so in any future society, whether socialist or capitalist. Bureaucracy is the only way of organizing large numbers of people effectively and therefore inevitably expands with economic and political growth. The developments of science, modern technology, and bureaucracy are examples of a general social process that Weber referred to collectively as rationalization. Rationalization means the organization of social, economic, and cultural life according to principles of efficiency, on the basis of technical knowledge.

Which interpretation of modern societies, that deriving from Marx or that coming from Weber, is correct? Scholars are divided on the issue. Moreover, within each camp are variations, so not every theorist agrees with all the points of one interpretation. The contrasts between these two standpoints inform many areas of sociology.

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**CONCEPT CHECKS**

1. **According to Émile Durkheim, what makes sociology a social *science*? Why?**
2. **According to Karl Marx, what are the differences between the two classes that make up a capitalist society?**
3. **In what key ways did Weber's interpretation of modern development differ from that of Marx?**

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# Glossary

social facts
: According to Émile Durkheim, the aspects of social life that shape our actions as individuals. Durkheim believed that social facts could be studied scientifically.

organic solidarity
: According to Émile Durkheim, the social cohesion that results from the various parts of a society functioning as an integrated whole.

social constraint

The conditioning influence on our behavior of the groups and societies of which we are members. Social constraint was regarded by Émile Durkheim as one of the distinctive properties of social facts.

division of labor

The specialization of work tasks by means of which different occupations are combined within a production system. All societies have at least some rudimentary form of division of labor, especially between the tasks allocated to men and those performed by women. With the development of industrialism, the division of labor became vastly more complex than in any prior type of production system. In the modern world, the division of labor is international in scope.

anomie

A concept first brought into wide usage in sociology by Émile Durkheim to refer to a situation in which social norms lose their hold over individual behavior.

materialist conception of history

The view developed by Karl Marx according to which material, or economic, factors have a prime role in determining historical change.

capitalism

An economic system based on the private ownership of wealth, which is invested and reinvested in order to produce profit.

bureaucracy

A type of organization marked by a clear hierarchy of authority and the existence of written rules of procedure and staffed by full-time, salaried officials.

rationalization

A concept used by Max Weber to refer to the process by which modes of precise calculation and organization, involving abstract rules and procedures, increasingly come to dominate the social world.

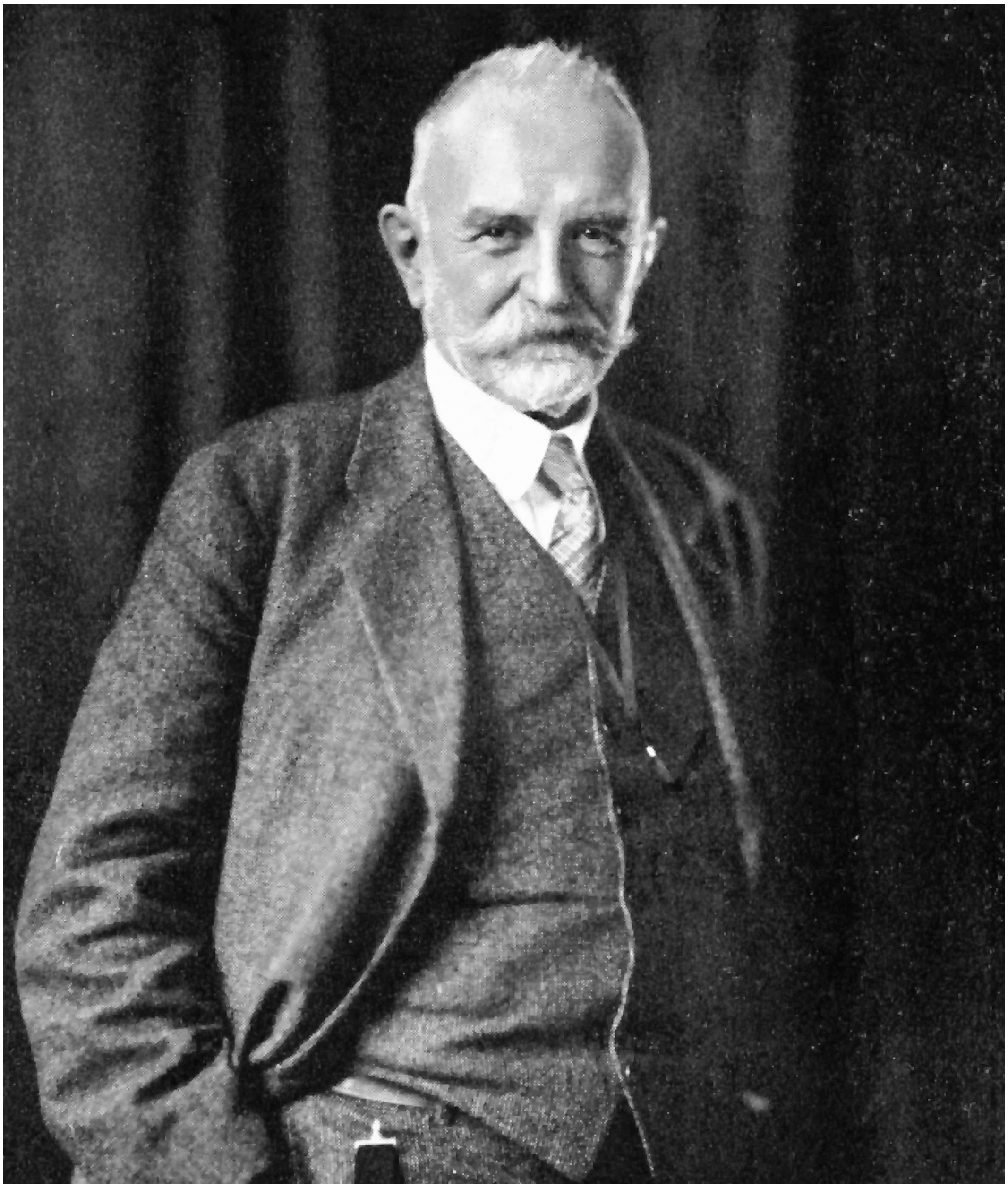
# 3 MODERN THEORETICAL APPROACHES

**Be able to identify some of the leading theorists and the concepts they contributed to sociology. Learn the different theoretical approaches modern sociologists bring to the field.**

Although the origins of sociology were mainly European, over the last century, the subject has become firmly established worldwide, and some of the most important developments have taken place in the United States.

## Symbolic Interactionism

The work of George Herbert Mead (1863–1931), a philosopher teaching at the University of Chicago, influenced the development of sociological thought, in particular through a perspective called symbolic interactionism. Mead placed particular importance on the study of language in analyzing the social world. According to him, language allows us to become self-conscious beings aware of our own individuality. The key element in this process is the symbol, something that stands for something else. For example, the word *tree* is a symbol by which we represent the object tree. Once we have mastered such a concept, Mead argued, we can think of a tree even if none is visible. Symbolic thought frees us from being limited in our experience to what we can actually see, hear, or feel.



George Herbert Mead (1863–1931)

Unlike animals, according to Mead, human beings live in a richly symbolic universe. This idea applies even to our very sense of self. Each of us is a self-conscious being because we learn to look at ourselves as if from the outside—as others see us. When a child begins to refer to themselves as "I," the object that till then others have called "you," the child is exhibiting the beginnings of self-consciousness.

All interactions among individuals, symbolic interactionists say, involve an exchange of symbols. When we interact with others, we constantly look for clues to discern what type of behavior is appropriate in the context and

interpret what others are up to. Symbolic interactionism directs our attention to the detail of interpersonal interaction and how that detail is used to make sense of what others say and do. For instance, suppose two people are on a first date. Each spends a good part of the evening sizing the other up and assessing how the relationship is likely to develop, if at all. Neither wishes to be seen doing this too openly, although each recognizes that it is going on. Both individuals are careful about their own behavior, being eager to present themselves in a favorable light, but, knowing this, both are looking for aspects of the other's behavior that reveal their true nature. A complex and subtle process of symbolic interpretation shapes their interaction.

# Functionalism

Symbolic interactionism has been criticized for concentrating too much on things that are small in scope. Symbolic interactionists have struggled to deal with larger-scale structures and processes—the very things that a rival tradition of thought, functionalism, emphasizes. Functionalist thinking in sociology was originally pioneered by Comte, who saw it as closely bound up with his overall view of the field.

To study the function of a social activity is to analyze its contribution to the continuation of the society as a whole. The best way to understand this idea is by analogy to the human body, a comparison that Comte, Durkheim, and other functionalist authors made. To study an organ such as the heart, we need to show how it relates to other parts of the body. When we learn how the heart pumps blood, we understand its vital role in the continuation of the organism's life. Similarly, analyzing the function of some aspect of society, such as religion, means examining its role in the continued existence and health of a society. Functionalism emphasizes the importance of moral consensus in maintaining order and stability in society. Moral consensus exists when most people share the same values. Functionalists regard order and balance as the normal state of society—this social equilibrium is grounded in a moral consensus among the members of society. According to Durkheim, for instance, religion reaffirms people's adherence to core social values, thereby helping to maintain social cohesion.

Robert K. Merton (1910–2003)

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Functionalism became prominent in sociology through the writings of Talcott Parsons (1902–1979) and Robert K. Merton (1910–2003), each of whom saw functionalist analysis as providing the key to the development of sociological theory and research. Merton's version of functionalism has been particularly influential.

In his work, Merton distinguished between manifest and latent functions. Manifest functions are those known to, and intended by, the participants in a social activity. Latent functions are consequences of that activity of

which participants are unaware. Merton used the example of a rain dance performed by the Hopi tribe of Arizona and New Mexico. The Hopi believe that the ceremony will bring the rain they need for their crops (manifest function). This is why they organize and participate in the dance. But using Durkheim's theory of religion, Merton argued that the rain dance also promotes the cohesion of Hopi society (latent function). A major part of sociological explanation, according to Merton, consists in uncovering the latent functions of social activities and institutions.

Merton also distinguished between functions and dysfunctions. To look for the dysfunctional aspects of social behavior means to focus on features of social life that challenge the existing order. For example, it is incorrect to suppose that religion is always functional—that it contributes only to social cohesion. When two groups support different religions or different versions of the same religion, the result can be major social conflicts, causing widespread social disruption. Thus, wars have often been fought between religious communities—as in the struggles between Protestants and Catholics in European history.

For much of the twentieth century, functionalist thought was considered the leading theoretical tradition in sociology, particularly in the United States. In recent years, its popularity has declined as its limitations have become apparent. While this was not true of Merton, many functionalist thinkers—Talcott Parsons is an example—unduly stressed factors leading to social cohesion at the expense of those producing division and conflict. In addition, many critics claim that functional analysis attributes to societies certain qualities they do not have. Functionalists often wrote as though societies had "needs" and "purposes," even though these concepts make sense only when applied to individual human beings.

# Conflict Theories

Functionalism and symbolic interactionism are not the only modern theoretical traditions of importance in sociology. A third influential approach is conflict theory. In general, conflict theories underscore the role of coercion and power in producing social order. Social order is believed to be maintained by domination, with power in the hands of those who possess the greatest political, economic, and social resources; historically, those with power would include White men with ample economic and

political resources. Two particular approaches typically classified under the broad heading of conflict theories are Marxism and feminist theories.

## Marxism

Marxists, of course, all trace their views back to the writings of Karl Marx, but today, some schools of Marxist thought take very different theoretical positions.

In all its variations, Marxism differs from non-Marxist traditions of sociology in that its adherents view sociology as a combination of sociological analysis and political reform. Marxism is supposed to generate a program of radical political change. Moreover, Marxists place more emphasis on conflict, class divisions, power, and ideology than do many non-Marxist sociologists, especially those influenced by functionalism. The concept of power is of great importance to Marxist sociologists and to sociology in general. Power refers to the ability of individuals or groups to make their own interests count, even when others resist. Power sometimes involves the direct use of force but is almost always accompanied by the development of ideologies (ideas), which are used to justify the actions of the powerful. Power, ideology, and conflict are always closely connected. Many conflicts are about power because of the rewards it can bring. Those who hold the most power may depend on the influence of ideology to retain their dominance, but they are usually also able to use force if necessary.

## Feminism and Feminist Theory

Feminist theory is one of the most prominent areas of contemporary sociology. This development is notable because gender issues are scarcely touched upon in the work of the major figures who established the discipline. The success of feminism’s entry into sociology required a fundamental shift in the discipline’s approach.

Many feminist theorists’ experiences in the women’s movement of the 1960s and 1970s influenced their work as sociologists. Like Marxism, feminism links sociological theory and political reform. Many feminist sociologists have been advocates for political and social action to eliminate the inequalities between women and men in both the public and the private spheres.

Feminist sociologists argue that women's lives and experiences are central to the study of society. Historically, sociology, like most academic disciplines, has presumed a male point of view. Concerned with women's subordination in society, feminist sociologists highlight gender relations and gender inequality as important determinants of social life in terms of both social interaction and social institutions such as the family, the workplace, and the educational system. Feminist theory emphasizes that gendered patterns and gendered inequalities are not natural but socially constructed. (We will cover this point in more detail in Chapter 10.)

Today, feminist sociology focuses on the intersection of gender, race, and class. A feminist approach to the study of inequality has influenced new fields of study, such as men's studies, sexuality studies, and LGBTQ+ studies. Taken together, these theoretical perspectives underscore power imbalances and draw attention to the ways that social change must entail shifts in the balance of power—consistent with the overarching themes of conflict theories.

Most conflict theory focuses on social conflicts within societies, such as those involving social classes, gender relations, and ethnic conflicts that do not break out into open violence. Perhaps this is because wars have been seen as rare events, rather than as natural states of affairs, and therefore have not been central to the development of sociological theory. The war between Russia and Ukraine reminds us that this assumption is not correct. In the course of human history, the existence of wars has been quite normal while periods of relative peace, such as most of the past several decades in Europe, have actually been quite rare.

# Rational Choice Theory

Max Weber thought that all behavior could be divided into four categories: (1) behavior oriented toward higher values, such as politics; (2) behavior oriented toward habit, such as walking to school on a familiar path; (3) behavior oriented toward affect (emotions), such as falling in love; and (4) behavior oriented toward self-interest, such as making money. Behavior in the last category is often called "instrumental," or "rational," action. In recent years, many sociologists have adopted an approach that focuses on this type of behavior. This approach has led numerous scholars to ask under what conditions human behavior can be said to constitute rational responses to opportunities and constraints.

The rational choice approach posits that if you could have only a single variable to explain society, self-interest would be the best one. A person who believes in this approach might even use it to explain things that seem irrational. One popular rational choice theory sees decisions to marry as maximizing self-interest in a marriage market; this understanding might explain why marriage has declined the most in poor African American communities with low rates of employment. The explanation—that it is not in the self-interest of women to marry men who cannot support them (Wilson, 1987)—goes against competing explanations suggesting that poor African Americans don't marry because they don't share mainstream values. The rational choice argument sees the decline as having little to do with values and much to do with self-interest under existing conditions. According to this theory, if employment rates for Black men were to change, so would the number of "eligible" men and the desire of women to marry them.

Rational choice theorists find few irrational mysteries in life. One of the few some note is love, which they define as the irrational act of substituting another person's self-interest for one's own (Becker, 1991). But such a definition makes it difficult to distinguish among basic altruism, friendship, and romantic love. Indeed, although a rational choice approach often can be useful, it cannot explain some aspects of life. Consider an angry driver who tries to teach a tailgater a lesson by tailgating the tailgater. Self-interest does not explain this action, because the "teacher" is unlikely personally to reap the benefits of a lesson well learned (Katz, 1999).

# Postmodern Theory

Advocates of postmodernism claim that the classic social thinkers' idea that history has a shape—it "goes somewhere" and leads to progress—has collapsed. No longer do any "grand narratives," or metanarratives—overall conceptions of history or society—make any sense (Lyotard, 1985). In fact, there is no such thing as history. The postmodern world is not destined, as Marx hoped, to be a socialist one. Instead, it is dominated by the new media, which "take us out" of our past. Postmodern society is highly pluralistic and diverse. As countless films, videos, TV programs, and websites circulate images around the world, the many ideas and values we encounter have little connection with our local or personal histories. Everything seems constantly in flux: "[F]lexibility, diversity,

differentiation, and mobility, communication, decentralization and internationalization are in the ascendant. In the process our own identities, our sense of self, our own subjectivities are being transformed" (Hall, 1988).

One important theorist of postmodernity, Jean Baudrillard (1929–2007), believed that electronic media created a chaotic, empty world. Despite being influenced by Marxism in his early years, Baudrillard argued that the spread of electronic communication and the mass media reversed the Marxist theorem that economic forces shape society. Instead, he asserted, social life is influenced above all by signs and images. In a media-dominated age, Baudrillard said, meaning is created by the flow of images, as in TV programs. Much of our world is now a make-believe universe in which we respond to media images rather than to real persons or places. Is "reality" television a portrayal of social "reality," or does it feature televised people who are perceived to be "real"? Do hunters in Louisiana really look and act like the Robertson family on *Duck Dynasty*, and do the tough guys in *Amish Mafia* resemble the peaceful Amish who live and work in Lancaster County, Pennsylvania? Baudrillard would say no and would describe such images as "the dissolution of life into TV" (Baudrillard, 1994, p. 30).

# Theoretical Thinking in Sociology

So far, we have been discussing theoretical approaches—broad orientations to the subject matter of sociology. Theoretical approaches are distinct from theories. Theories are more narrowly focused and represent attempts to explain particular social conditions or types of events. Theories are usually formed during the research process and in turn suggest other problems for subsequent research. An example would be Durkheim's theory of suicide, referred to earlier in this chapter.

Sociologists do not share a unified position on whether theories should be specific, wide-ranging, or somewhere in between. Merton (1957), for example, argued that sociologists should concentrate on what he called theories of the middle range. Rather than attempting to create grand theoretical schemes (in the manner of Marx, for instance), sociologists should develop more modest theories. Middle-range theories are specific enough to be tested by empirical research, yet sufficiently general to cover a range of phenomena.

Consider the theory of relative deprivation, which holds that how people evaluate their circumstances depends on the persons to whom they compare themselves. Thus, feelings of deprivation do not conform directly to the level of material poverty one experiences. A family living in a small home in a poor area, where everyone is living in similar circumstances, is likely to feel less deprived than a family living in a similar house in a neighborhood where other homes are much larger and other people more affluent.

Assessing theories in sociology, especially theoretical approaches, is a challenging and formidable task. The fact that there is no single theoretical approach that dominates the whole of sociology might be viewed as a limitation. But this is not the case: The jostling of rival theoretical approaches and theories actually highlights the vitality of the sociological enterprise. In studying human beings (ourselves), theoretical variety rescues us from dogma. Human behavior is complex, and no single theoretical perspective could adequately cover all its aspects. Diversity in theoretical thinking provides a rich source of ideas for research and stimulates the imaginative capacities so essential to progress in sociological work.

## Levels of Analysis: Microsociology and Macrosociology

An important distinction among the theoretical perspectives we've discussed in this chapter involves the level of analysis at which each is directed. The study of everyday behavior in situations of small-scale face-to-face interaction is called microsociology. Macrosociology, by contrast, is the analysis of large-scale social systems, such as the political system or the economy. It also includes analysis of long-term processes of change, such as the development of industrialization. Although micro analysis and macro analysis may seem distinct from each other, in fact, the two are closely connected (Giddens, 1984; Knorr-Cetina & Cicourel, 1981).

Microsociology focuses on small-scale face-to-face interactions (left), while macrosociology analyzes large-scale forces (right). How might a microsociologist and a macrosociologist analyze this food court differently?

Macro analysis is essential for understanding the institutional background of daily life. The ways in which people live their everyday lives are shaped by the broader institutional framework. Consider a comparison of the daily cycle of activities in a medieval culture and in an industrialized urban

environment. In modern societies, we are constantly in contact with strangers—however indirect and impersonal. No matter how many indirect or electronic relationships we enter into, even the most complex societies require the presence of other people. While we may opt to just text or email an acquaintance, we can also choose to fly thousands of miles to spend the weekend with a friend.

Micro studies, in turn, are necessary for illuminating broad institutional patterns. Face-to-face interaction is the basis of all forms of social organization, no matter how large scale. In studying a business corporation, we could analyze the face-to-face interactions of directors in the boardroom, staff working in their offices, or workers on the factory floor. We would not gain a clear picture of the whole corporation in this way, because some of its business involves email, phone calls, and printed materials. Yet we could certainly contribute significantly to understanding how the organization works.

Later chapters will give further examples of how interaction in micro contexts affects larger social processes and how macro systems in turn influence the more confined settings of social life.

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**CONCEPT CHECKS**

1. **What are the differences between symbolic interactionism and functionalist approaches to the analysis of society?**
2. **How do rational choice theorists explain human behavior?**
3. **What role does theory play in sociological research?**
4. **How are macro and micro analyses of society connected?**

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# Glossary

symbolic interactionism
: A theoretical approach in sociology developed by George Herbert Mead that emphasizes the role of symbols and language as core elements of all human interaction.

symbol
: One item used to stand for or represent another, as in the case of a flag symbolizing a nation.

functionalism

A theoretical perspective based on the notion that social events can best be explained in terms of the functions they perform—that is, the contributions they make to the continuity of a society.

manifest functions

The functions of a type of social activity that are known to and intended by the individuals involved in the activity.

latent functions

Functional consequences that are not intended or recognized by the members of a social system in which they occur.

conflict theory

The argument that deviance is deliberately chosen and often political in nature.

Marxism

A body of thought deriving its main elements from the ideas of Karl Marx.

power

The ability of individuals or the members of a group to achieve aims or further the interests they hold. Power is a pervasive element in all human relationships. Many conflicts in society are struggles over power, because the amount of power an individual or group holds governs its ability to put its wishes into practice.

ideologies

Shared ideas or beliefs that serve to justify the interests of dominant groups. Ideologies are found in all societies in which there are systematic and ingrained inequalities among groups. The concept of ideology connects closely with that of power, since ideological systems serve to legitimize the power that groups hold.

feminist theory

A sociological perspective that emphasizes the centrality of gender in analyzing the social world and particularly the uniqueness of the experience of women. There are many strands of feminist theory, but they all share the desire to explain gender inequality in society and to work to overcome it.

feminism

Advocacy of the rights of women to be equal with men in all spheres of life. Feminism dates from the late eighteenth century in Europe, and feminist movements exist in most countries today.

rational choice approach

More broadly, the theory that an individual's behavior is purposive. Within the field of criminology, rational choice analysis argues that

deviant behavior is a rational response to a specific social situation.

postmodernism
: The belief that society is no longer governed by history or progress. Postmodern society is highly pluralistic and diverse, with no “grand narrative” guiding its development.

microsociology
: The study of human behavior in the context of face-to-face interaction.

macrosociology
: The study of large-scale groups, organizations, or social systems.

# 4 HOW CAN SOCIOLOGY HELP US?

**Understand how adopting a sociological perspective allows us to develop a richer understanding of ourselves and the world.**

As we discussed at the beginning of the chapter, sociological thinking is relevant to your day-to-day life—from understanding the profound impact of the war between Russia and Ukraine to the actual value of going to a fancy college. C. Wright Mills emphasized these practical applications of sociology when developing his idea of the sociological imagination. When we observe the world through the prism of the sociological imagination, we are affected in several important ways.

First, sociology allows us to see the social world from many perspectives. If we properly understand how others live, we better understand their problems. Practical policies that lack an informed awareness of the ways of life of the people they affect have little chance of success. Thus, a White social worker operating in a predominantly Black community won't gain the confidence of its members if he isn't sensitive to the differences in social experiences of Whites and Blacks in the United States.

In her book *$2.00 a Day: Living on Almost Nothing in America*, sociologist Kathryn Edin explains how one unintended consequence of welfare reform was a dramatic increase in households with children living on $2 or less a day.

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Second, we are better able to assess the results of public policy initiatives. For example, a program of practical reform may fail to achieve its goals or may produce unintended negative consequences. Consider the large public-housing blocks built in city centers in many countries following World War II. The goal was to provide high standards of accommodation for low-income groups from slum areas and to offer shopping amenities and other civic services close at hand. However, research later showed that many people who moved to the large apartment blocks felt isolated and unhappy. High-rise apartment blocks and shopping malls in poorer areas often became dilapidated and provided breeding grounds for muggings and other violent crimes.

Third, and perhaps most important, sociology can provide us with self-enlightenment—increased self-understanding. The more we know about our own behavior and how our society works, the better chance we have to influence our futures. Sociology doesn't just help policy makers make informed decisions. Those in power may not always consider the interests of the less powerful or underprivileged when making policies. Self-enlightened groups can benefit from sociological research by using the

information gleaned to respond to government policies or form policy initiatives of their own. Self-help groups such as Alcoholics Anonymous (AA) and social movements such as the environmental movement are examples of social groups that have directly sought practical reforms, with some success.

Finally, developing a sociological eye toward social problems and developing rigorous research skills opens many career doors—as industrial consultants, urban planners, social workers, and personnel managers, among other jobs. An understanding of society also serves those working in law, journalism, business, and medicine.

Those who study sociology frequently develop a social conscience. Should sociologists themselves agitate for programs of reform or social change? Some argue that sociology can preserve its intellectual independence only if sociologists remain neutral in moral and political controversies. Yet are scholars who remain aloof more impartial in their assessment of sociological issues than others? No sociologically sophisticated person can be unaware of the inequalities, the lack of social justice, or the deprivations suffered by millions of people worldwide. It would be strange if sociologists did not take sides on practical issues, and it would be illogical to ban them from drawing on their expertise in doing so.

We have seen that sociology is a discipline in which we often set aside our personal views to explore the influences that shape our lives and those of others. Sociology emerged as an intellectual endeavor along with the development of modern societies, and the study of such societies remains its principal concern. But sociologists are also preoccupied with the nature of social interaction and human societies in general.

Sociology has major practical implications for people's lives. Learning to become a sociologist should be not a dull academic endeavor but rather an exciting pursuit! The best way to make sure the pursuit is exciting is to approach the subject in an imaginative way and to relate sociological ideas and findings to your own life.

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**CONCEPT CHECKS**

1. **Describe three ways that sociology can help us in our lives.**

2. **What skills and perspectives do sociologists bring to their work?**

# THE BIG PICTURE

# Chapter 1

## What Is Sociology?

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**Exercises:** Thinking Sociologically

1. Healthy older Americans often encounter exclusionary treatment when younger people assume they are feebleminded and thus overlook them for jobs they are fully capable of doing. How would functionalism and symbolic interactionism explain the dynamics of prejudice against the elderly?

# BASIC CONCEPTS p. 7

## Learning Objectives

Learn what sociology covers as a field and how everyday topics are shaped by social and historical forces. Recognize that sociology involves not only acquiring knowledge but also developing a sociological imagination.

## Terms to Know

globalization • sociological imagination • social structure • social construction • socialization

## Concept Checks

1. What is the sociological imagination, according to C. Wright Mills?
2. How does sociology help us disentangle what is biological from what is socially constructed?
3. How does the concept of social structure help sociologists better understand social phenomena?

# THE DEVELOPMENT OF SOCIOLOGICAL THINKING p. 12

## Learning Objectives

Learn how sociology originated and understand the significance of the intellectual contributions of early sociologists.

## Terms to Know

social facts • organic solidarity • social constraint • division of labor • anomie • materialist conception of history • capitalism • bureaucracy • rationalization

## Concept Checks

1. According to Émile Durkheim, what makes sociology a social *science*? Why?
2. According to Karl Marx, what are the differences between the two classes that make up a capitalist society?
3. In what key ways did Weber's interpretation of modern development differ from that of Marx?

# MODERN THEORETICAL APPROACHES p. 19

## Learning Objectives

Be able to identify some of the leading theorists and the concepts they contributed to sociology. Learn the different theoretical approaches modern sociologists bring to the field.

## Terms to Know

symbolic interactionism • symbol • functionalism • manifest functions • latent functions • conflict theory • Marxism • power • ideologies • feminist theory • feminism • rational choice approach • postmodernism • microsociology • macrosociology

## Concept Checks

1. What are the differences between symbolic interactionism and functionalist approaches to the analysis of society?
2. How do rational choice theorists explain human behavior?
3. What role does theory play in sociological research?
4. How are macro and micro analyses of society connected?

# HOW CAN SOCIOLOGY HELP US? p. 27

## Learning Objectives

Understand how adopting a sociological perspective allows us to develop a richer understanding of ourselves and the world.

## Concept Checks

1. Describe three ways that sociology can help us in our lives.
2. What skills and perspectives do sociologists bring to their work?

# Glossary

globalization
: The development of social and economic relationships stretching worldwide. In current times, we are all influenced by organizations and social networks located thousands of miles away. A key part of the study of globalization is the emergence of a world system—for some purposes, we need to regard the world as forming a single social order.

sociological imagination
: The application of imaginative thought to the asking and answering of sociological questions. People who use the sociological imagination "think themselves away" from the familiar routines of daily life.

social structure
: The underlying regularities or patterns in how people behave in their relationships with one another.

social construction
: An idea or practice that a group of people agree exists. It is maintained over time by people taking its existence for granted.

socialization
: The social processes through which children develop an awareness of social norms and values and achieve a distinct sense of self. Although socialization processes are particularly significant in infancy and childhood, they continue to some degree throughout life. No individuals are immune from the reactions of others around them, which influence their behavior at all phases of the life course.

social facts
: According to Émile Durkheim, the aspects of social life that shape our actions as individuals. Durkheim believed that social facts could be studied scientifically.

organic solidarity
: According to Émile Durkheim, the social cohesion that results from the various parts of a society functioning as an integrated whole.

social constraint

The conditioning influence on our behavior of the groups and societies of which we are members. Social constraint was regarded by Émile Durkheim as one of the distinctive properties of social facts.

division of labor

The specialization of work tasks by means of which different occupations are combined within a production system. All societies have at least some rudimentary form of division of labor, especially between the tasks allocated to men and those performed by women. With the development of industrialism, the division of labor became vastly more complex than in any prior type of production system. In the modern world, the division of labor is international in scope.

anomie

A concept first brought into wide usage in sociology by Émile Durkheim to refer to a situation in which social norms lose their hold over individual behavior.

materialist conception of history

The view developed by Karl Marx according to which material, or economic, factors have a prime role in determining historical change.

capitalism

An economic system based on the private ownership of wealth, which is invested and reinvested in order to produce profit.

bureaucracy

A type of organization marked by a clear hierarchy of authority and the existence of written rules of procedure and staffed by full-time, salaried officials.

rationalization

A concept used by Max Weber to refer to the process by which modes of precise calculation and organization, involving abstract rules and procedures, increasingly come to dominate the social world.

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A theoretical approach in sociology developed by George Herbert Mead that emphasizes the role of symbols and language as core elements of all human interaction.

symbol

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functionalism

A theoretical perspective based on the notion that social events can best be explained in terms of the functions they perform—that is, the contributions they make to the continuity of a society.

manifest functions

The functions of a type of social activity that are known to and intended by the individuals involved in the activity.

latent functions

Functional consequences that are not intended or recognized by the members of a social system in which they occur.

conflict theory

A sociological perspective that emphasizes the role of political and economic **power** and oppression as contributing to the existing social order.

Marxism

A body of thought deriving its main elements from the ideas of Karl Marx.

power

The ability of individuals or the members of a group to achieve aims or further the interests they hold. Power is a pervasive element in all human relationships. Many conflicts in society are struggles over power, because the amount of power an individual or group holds governs its ability to put its wishes into practice.

ideologies

Shared ideas or beliefs that serve to justify the interests of dominant groups. Ideologies are found in all societies in which there are systematic and ingrained inequalities among groups. The concept of ideology connects closely with that of power, since ideological systems serve to legitimize the power that groups hold.

feminist theory

A sociological perspective that emphasizes the centrality of gender in analyzing the social world and particularly the uniqueness of the experience of women. There are many strands of feminist theory, but they all share the desire to explain gender inequality in society and to work to overcome it.

feminism

Advocacy of the rights of women to be equal with men in all spheres of life. Feminism dates from the late eighteenth century in Europe, and feminist movements exist in most countries today.

rational choice approach

More broadly, the theory that an individual's behavior is purposive. Within the field of criminology, rational choice analysis argues that deviant behavior is a rational response to a specific social situation.

postmodernism

The belief that society is no longer governed by history or progress. Postmodern society is highly pluralistic and diverse, with no "grand narrative" guiding its development.

microsociology

The study of human behavior in the context of face-to-face interaction.

macrosociology

The study of large-scale groups, organizations, or social systems.

# 2 Asking and Answering Sociological Questions

Sociology today

1. **relies on data and evidence to draw conclusions about human behavior.**
2. **uses a range of different methods to study human behavior.**
3. **is a science, just as chemistry and biology are sciences.**
4. **All of the above.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

## LEARNING OBJECTIVES

1. **Basic Concepts** Learn how the standards of empirical social science research apply to sociology. Name the seven stages of the research process.
2. **Asking and Answering Sociological Questions: Historical Context** Contrast Park's and Ogburn's visions of sociology as a science. Understand their influence on contemporary sociological research.
3. **Asking and Answering Sociological Questions Today: Research Methods** Familiarize yourself with the methods available to sociological researchers, and recognize the advantages and disadvantages of each.
4. **Unanswered Questions** Understand how research methods generate controversies and ethical dilemmas for sociologists.

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When was the last time you posted a video on TikTok, liked a friend's image on Instagram, or swiped right on a dating app? Many of us use social networking to keep up with friends and family, share details about our lives with a wider audience, and even form new relationships. Platforms like Facebook not only allow us to keep up with those we care about, but also serve as a detailed record of our social relationships.

In recent years, scholars have taken data from our Twitter and Instagram pages to ask questions about whom we interact with, whom we befriend, and whom we love. One study claimed that Facebook could predict whether our romantic relationships would last. To make this argument, researchers drew on a large dataset of more than 1 million individuals in romantic relationships, as well as their Facebook friends—a total of nearly 380 million Facebook users. They found that if two people were romantic partners and their friendship groups overlapped a great deal, meaning they had the same group of friends, they had a higher likelihood of staying together (Backstrom & Kleinberg, 2014).

Sociological research helps us understand human behavior by using a range of rigorous and scientific methods. If you answered A, B, or C to the question on the previous page, you would be correct. Increasingly, sociological studies are relying on statistical or quantitative methods and computer programs that make it possible to analyze the vast amounts of

data the Internet generates. These methods allow sociologists to process more data than ever before.

Even as we reap all the scientific potential that can be seen in the age of big data, we must also contend with its potential arrogance. Some researchers feel more confident than ever before in the claims that can be made from big datasets. Researchers who have never lived in poverty, or never had a relationship with a person who was food insecure, feel they can speak with authority about inequality and poverty from a study based on interesting statistical correlations. In the age of big data, empathy and involvement with the communities and people under study are less frequently the basis of social scientific insights.

Yet sociology also has a rich tradition that includes qualitative methods, which rely on observations, interviews, and archival data. Here, personal involvement and empathy count for a great deal, though most of the insights in qualitative studies also derive from other kinds of sociological thinking. While quantitative analyses may make use of numerical data (such as responses collected in surveys or numbers of Instagram followers), qualitative analyses may use data derived from interactions, interviews, conversations, or observations of a social scene. For example, a qualitative study of the same question asked in the Facebook study of romantic relationships might use fewer cases to focus on richer details of how individuals dissolve their relationships. In *Uncoupling*, Diane Vaughan (1986) explored this question by using interviews with people who broke up to better understand how relationships end.

Does the reliance on qualitative methods make sociology less of a science? It does not. Do quantitative methods make sociology more scientific? They do not. When many people think of a "science," they typically imagine fields like physics or chemistry. Yet, as we shall see, what makes chemistry and physics a science is not the sample size or even the subject matter, but rather a set of values that can be deployed in any research. In this chapter, we begin by discussing those values to clarify the meaning of *science* in social science.

# Glossary

quantitative methods

Approaches to sociological research that draw on objective and statistical data and often focus on documenting trends, comparing subgroups, or exploring correlations.

qualitative methods

Approaches to sociological research that often rely on personal and/or collective interviews, accounts, or observations of a person or situation.

# 1 BASIC CONCEPTS

**Learn how the standards of empirical social science research apply to sociology. Name the seven stages of the research process.**

Regardless of whether it is quantitative or qualitative, sociological research that is striving to be scientific tries to meet basic scientific standards (King et al., 1994).

First, the goal of sociological research is *inference*. By this we mean that when we make observations particular to a specific setting or group, the goal is to be able to generalize beyond that specific entity to others of its kind. In other words, while sociologists cannot collect data about the whole world, they are able to use more limited data to make broader claims about phenomena they cannot directly observe (King et al., 1994). Take as an example *Uncoupling*. If Diane Vaughan had limited her claim to the 103 interviews she recorded, this material on its own would not constitute a sociological analysis. Moving beyond these interviews to make more general claims about how we—as humans—form and break romantic relationships is part of what makes her analysis scientific.

Second, sociologists must ensure that other researchers can retrace the paths to their findings. Ideally, others in the scientific community can reproduce their results. The procedures researchers use for collecting and analyzing data should be public; the reliability of research data can be verified only if the ways in which that data were collected and processed are made explicit to the scientific community, allowing other researchers both to learn from the methods used and to address the limitations of these methods. What's more, careful documentation of the way one arrives at conclusions about the social world allows research findings to be comparable even when conducted by researchers at different times.

Third, the conclusions of all scientific research, including sociology, are uncertain. This might be surprising. Isn't the purpose of studying the social world to be able to make forceful arguments about it? The values of science sometimes demand that we do the opposite. The scientific validity of inferences can be assessed only if researchers are clear about all the sources of their uncertainty. In sociology, like any science, the

highest status is conferred on those who are honest about how certain their conclusions really are. Sociologists need to specify all the possible sources of uncertainty in their study.

All three of the previous standards of empirical research are found in both the natural sciences and the social sciences. They are also shared by quantitative and qualitative social science. It is important to highlight a fourth element that is emphasized more in the social sciences—particularly in qualitative research. This is called *reflexivity*. For social scientists, it is particularly important to acknowledge that the investigator is a crucial part of the world she studies and cannot necessarily divorce herself from it. This includes power dynamics among subjects and the ways in which personal values or personal identity influence both the nature of the questions asked and the interpretation of data. Social scientists must thus be ready to reflect on how the way they are part of the social scenes they study may affect the kinds of conclusions they draw. For example, a middle-class researcher studying a community living in poverty should be clear about how his class position influenced a sociological argument or the relations with subjects.

These four principles help identify work that is living up to the highest ideals of social science. Some good scientific work might not necessarily be strong in all the areas at once, but the goal of social science should be to achieve as many of them as possible. While these principles are useful for understanding how sociology can strive to be a science, they don't provide a practical guide for how one might begin defining and going on to answer a research question. To do this, we now consider the research process.

# The Research Process

In order to understand the way sociology asks and answers questions, it is helpful to think of sociological research as a process. We can better understand the main concepts of research design by breaking down the process into seven stages of research, beginning with the definition of a research question and ending with the dissemination of the study findings.

## 1. Define the Research Problem

All research starts with a research problem. This problem may be an area of factual ignorance about, say, certain institutions, social processes, or cultures. A researcher might seek to answer questions such as these: What proportion of the population holds strong religious beliefs? Are people today disaffected with "big government"? How far does the economic position of women lag behind that of men? Do LGBTQ+ and straight teens differ in their levels of self-esteem?

In looking at this painting by Pieter Brueghel the Elder, we can observe the number of people, what each is doing, and the style of the buildings. But without the title, *Netherlandish Proverbs* (1559), these facts tell us nothing about the picture's meaning. In the same way, sociologists need theory as a context for their observations.

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The best sociological research begins with problems that are also puzzles. A puzzle arises not simply from a lack of information but also from a gap in our understanding. Much of the skill in producing worthwhile sociological research lies in correctly identifying puzzles.

Rather than just answering the question "What is going on here?" skilled researchers try to illuminate why events happen as they do. Thus, we might ask, Why are patterns of religious belief changing? What accounts for the recent rise in political polarization in the United States? Why are

women poorly represented in science and technology jobs? What are the characteristics of high schools with high levels of bullying?

No piece of research stands alone. One project may lead to another because it raises issues the researcher had not previously considered. A sociologist may discover puzzles by reading the work of other researchers in books and academic journals or by being aware of social trends. For example, over the past century, practitioners have sought to treat people with mental illness while they continue to live in the community rather than confining them in institutions. Sociologists might be prompted to ask, What has caused this shift in attitudes toward people with mental illness? What are the likely consequences for the patients, their family members, and the rest of the community?

## 2. Review the Literature

Once a research problem is identified, the sociologist must review related research: Have previous researchers spotted the same puzzle? How have they tried to solve it? What aspects of the problem has their research left unanalyzed? Have they looked only at small segments of the population, such as one age group, gender, or region? Drawing on others' ideas helps the sociologist clarify the relevant issues and the appropriate research methods.

## 3. Make the Problem Precise

A third stage involves clearly formulating the research problem. If relevant literature already exists, the researcher may have a good idea of how to approach the problem. At this stage, hunches sometimes become hypotheses—educated guesses about what is going on. For the research to be effective, the researcher must formulate a hypothesis in such a way that the factual material gathered will provide evidence either supporting or disproving it.

## 4. Work Out a Design

The researcher then decides how to collect the research materials, choosing from a range of methods based on the study objectives as well as the aspects of behavior under study. For some purposes, a survey

(usually involving questionnaires) might be suitable. In other circumstances, interviews or an observational study might be appropriate.

## 5. Carry Out the Research

Researchers then proceed to carry out the plan developed in step 4. However, during the actual research, unforeseen practical difficulties may arise that force the researcher to rethink his initial strategy. For example, it might prove impossible to contact certain questionnaire recipients or interview subjects. A business firm or government agency might not let the researcher carry out the work as planned. Yet omitting such persons or institutions from the study could bias the results, creating an inaccurate or incomplete picture of social reality. For instance, a researcher studying how business corporations have complied with affirmative action programs might find that companies that have not complied do not wish to be studied.

## 6. Interpret the Results

Once the information has been gathered, the researcher's work is not over —it is just beginning! The researcher must analyze the data, track trends, and test hypotheses. Most important, researchers must interpret their results in such a way that they tell a clear story and directly address the research puzzle outlined in step 1. Although it may be possible to reach clear answers to the initial questions, many investigations are ultimately not fully conclusive.

## 7. Report the Findings

The research report, usually published as a journal article or book, provides an account of the research question, methods, findings, and the implications of the findings for social theory, public policy, or practice. This stage is only final in terms of the individual project. Most reports identify unanswered questions and suggest new questions for further research. All individual research investigations are part of the continuing process of research within the sociological community.

## Reality Intrudes!

The preceding sequence of steps is a simplified version of what happens in actual research projects. These stages rarely succeed each other so neatly; the difference is like that between the recipes outlined in a cookbook and the actual process of preparing a meal: Deviations can sometimes be necessary and beneficial. Experienced cooks often don't work from recipes at all, yet they might cook better meals than those who do. Following fixed schemes can be unduly restricting; much outstanding sociological research would not fit rigidly into this sequence, though it would include most of the steps outlined here.

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**CONCEPT CHECKS**

1. **Compare and contrast qualitative and quantitative research methods.**
2. **What are the seven steps of the research process?**
3. **What is a hypothesis?**

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# Glossary

hypotheses
: Ideas or educated guesses about a given state of affairs, put forward as bases for empirical testing.

# 2 ASKING AND ANSWERING SOCIOLOGICAL QUESTIONS: HISTORICAL CONTEXT

**Contrast Park's and Ogburn's visions of sociology as a science. Understand their influence on contemporary sociological research.**

When sociology began as a discipline, it was a highly theoretical field. It consisted of much armchair speculation, and many of the notions it developed about how the world worked were not well grounded in evidence. But in the 1920s, U.S. sociologists, largely at the University of Chicago, developed a more intense commitment to the idea that such theoretical speculations were not enough—that sociology as a discipline needed to ground its concepts and theories in facts and data.

This goal for sociology was represented in two figures, both of whom were professors at the University of Chicago: Robert Park (1864–1944) and William Ogburn (1886–1959). Park's beliefs about how to make social research more scientific came from his background, both as a student of philosophy in Europe and as a reporter for the *Minneapolis Star*. He was interested in developing theories but wanted them to relate directly to the actual lives of people and to be based on the careful accumulation of evidence about people's lives. He told his students that to do real research they needed to get the seat of their pants dirty, to wear out their shoe leather to discover the truth.

Park thought that the most important thing for a sociologist to do was to go around all the neighborhoods of the city and find out what was going on by meeting the people who were the subjects of the sociologists' theories. Following Park's lead, the University of Chicago's sociology department used the city as a laboratory. Its sociologists took on roles in the community to see how the community's members lived, conducting interviews and firsthand observations. Their research reports tended to be highly systematic, well written, and oriented toward improving conditions in the city and around the United States.

(left) William Ogburn (1886–1959) and (right) Robert Park (1864-1944)

William Ogburn, however, Park's colleague in the department of sociology at the University of Chicago, didn't believe that the future of sociology lay in shoe leather, well-written books, findings that could not be quantified, or efforts to influence public policy. These, he thought, were the domain of ethics, religion, journalism, and propaganda. In his presidential address to the American Sociological Society (since renamed American Sociological Association), he argued that sociology needed to become a science (Ogburn, 1930). The goal, he argued, was not "to make the world a better place in which to live" or to set forth "impressions of life" or to "[guide] the ship of state" but only to "[discover] new knowledge." Ogburn wanted sociology to be a field that looked a lot more like the natural sciences in

both its presentation and its orientation. Whereas Park had clear ideas about what the subject matter of sociology should be (immigration and the life of the city), Ogburn believed sociologists could study anything that could be measured with numbers.

These two figures, Park and Ogburn, coexisted at the University of Chicago for many years, each committed to his own vision of sociology as a science. For Park and his students, the personal, emotional, and scientific side of sociology complemented the aspiration to develop explanations about the social world. We can see this legacy in the work of young sociologists today. But the legacy of William Ogburn is no less significant. The value of statistics and scientific methodologies for understanding the world has never been greater, in part because of the massive amount of data and information being collected on the Internet. More than ever before, business and government need people who can analyze this material and who are disposed to think about the world in a scientific way.

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**CONCEPT CHECKS**

1. **How did Park and Ogburn approach sociological research differently? In what ways did each sociologist influence researchers today?**

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# 3 ASKING AND ANSWERING SOCIOLOGICAL QUESTIONS TODAY: RESEARCH METHODS

**Familiarize yourself with the methods available to sociological researchers, and recognize the advantages and disadvantages of each.**

Let's look at the various research methods sociologists currently employ (**Table 2.1**). Whereas many fields have one main method, modern sociology embraces a variety of methodologies. People trained in sociology end up developing a wide range of research skills, which makes them quite versatile after graduation. Here are the basic methods used today, with examples drawn from recent research.

## Ethnography

One widely used qualitative method is ethnography, or firsthand studies of people using observations, interviews, or both. Here, the investigator socializes, works, or lives with members of a group, organization, or community. In the case of participant observation, researchers participate directly in the activities they are studying. Other ethnographers, by contrast, may observe at a distance and not participate directly in the activities under observation. An ethnographer cannot simply be present in the group she studies but must explain and justify her presence to its members. The researcher must gain and sustain the cooperation of the community to achieve worthwhile results.

**Table 2.1 THREE OF THE MAIN METHODS USED IN SOCIOLOGICAL RESEARCH**

| **RESEARCH METHOD** | **STRENGTHS** | **LIMITATIONS** |
|---|---|---|
| **Ethnography** | Usually generates richer and more in-depth information than other methods.<br><br>Can provide a broader understanding of social processes. | Can be used to study only relatively small groups or communities.<br><br>Findings might apply only to groups or communities studied; not easy to generalize on the basis of a single fieldwork study. |
| **Surveys** | Make possible the efficient collection of data on large numbers of individuals.<br><br>Allow for precise comparisons to be made among the answers of respondents. | Material gathered may be superficial; if questionnaire is highly standardized, important differences among respondents' viewpoints may be glossed over.<br><br>Responses may be what people profess to believe rather than what they actually believe. |

| RESEARCH METHOD | STRENGTHS | LIMITATIONS |
|---|---|---|
| **Experiments** | Influence of specific variables can be controlled by the investigator.<br><br>Are usually easier for subsequent researchers to repeat. | Many aspects of social life cannot be brought into the laboratory.<br><br>Responses of those studied may be affected by the experimental situation. |

For a long while, research based on participant observation excluded accounts of the hazards or problems involved, but more recently, field-workers have been more open. Frequently, field-workers experience feelings of loneliness and frustration, the latter occurring especially when group members refuse to talk frankly with them. Some types of fieldwork may be physically dangerous; for instance, a researcher studying a gang might be seen as a police informer or might become unwittingly embroiled in conflicts with rival gangs.

In traditional works of ethnography, accounts provided little information about the observer because ethnographers were expected to present objective reports. More recently, ethnographers have increasingly spoken about their connection to the people under study. For example, a researcher might discuss how his race, class, or gender affected the work, or how the power differences between observer and observed distorted the dialogue between them.

## Advantages and Limitations of Fieldwork

An officer inspects a tent in the Los Angeles neighborhood known as Skid Row. Sociologist Forrest Stuart spent five years doing fieldwork in the area, documenting the powerful ways the criminal justice system affected the lives of people experiencing homelessness.

Successful ethnography provides rich information on the behavior of people in groups, organizations, and communities, as well as information on how these people understand their own behavior. Once we look inside a given group, we can better understand not only that group but also broader social processes.

But fieldwork has its limitations. Only fairly small groups or communities can be studied. Much also depends on the researcher's skill in gaining the confidence of the individuals involved. Also, a researcher could identify so closely with the group that he loses the perspective of an objective outside observer. Or a researcher might draw conclusions that are more about his own effect on the situation than he or his readers realize. Interpreting ethnographies usually involves problems of generalizability because we cannot be sure that what we find in one context will apply in others, or even that two different researchers will draw the same conclusions when studying the same group.

## A Recent Example of an Ethnography

Sociologist Forrest Stuart is an ethnographer whose work vividly portrays the ways that poverty shapes everyday lives. For his book *Down, Out, and Under Arrest: Policing and Everyday Life in Skid Row* (2016), he did five years of fieldwork in the downtown Los Angeles neighborhood known as Skid Row, an area inhabited by many homeless persons and constantly monitored by police. His research revealed the powerful ways that the criminal justice system affected the lives of the people living on the streets of Los Angeles. For example, Juliette, a woman he met during his fieldwork, had been stopped by police well over 100 times, had been arrested more than 60 times, and had spent more than a year of her life serving weeklong jail sentences. Her most common crime? Simply sitting on the sidewalk—an arrestable offense in L.A.

Stuart was especially interested in how police officers carried out their work. He found that the police officers were not heartless villains but complex, multidimensional people who felt deep tensions between their desire to help the homeless people on Skid Row and their need to carry out their jobs and make arrests (Carr et al., 2021, p. 317). He described the police officers' work as "therapeutic policing," in which officers used the threat of arrest or citation to try to coax urban poor people off the streets and into the welfare system that could provide social services and supports they need. Yet Stuart also uncovered the costs of doing so. For instance, couples and families often would be separated, or would have to forsake many of their possessions if placed into separate shelters. His complex results suggest that rather than focusing on policing or social services as the solutions to homelessness, policy initiatives should focus on the creation of more ample and secure housing for people living in financial precarity.

# Surveys

Quantitative methodologists have a range of analytical tools and data resources at their disposal, but surveys are the most commonly used. When conducting a survey, researchers ask subjects to provide answers to structured questionnaires, which are administered in person, over the phone, or via mail or email to a select group of people. This group is known as a population. While ethnographies are best suited for in-depth studies of small slices of social life, survey research produces information that is less detailed but can be generalized to the population as a whole.

## Standardized and Open-Ended Questions

Two types of questions are used in surveys. With *standardized*, or *fixed-choice*, questions, only a fixed range of responses is possible—for example, Yes/No/Don't Know or Very Likely/Likely/Unlikely/Very Unlikely. The advantage of such questions is that responses are easy to count and compare because only a small number of categories are involved. However, because they do not allow for subtleties of opinion or verbal expression, they may yield restrictive, if not misleading, information.

Open-ended questions, by contrast, typically provide more detailed information because respondents may express their views in their own words and the researcher can ask follow-up questions to probe more deeply into what the respondent thinks. However, the lack of standardization means that responses may be difficult to compare statistically.

In surveys, all the items must be readily understandable to interviewers and interviewees alike. Questions are usually asked in a set order. In large national surveys undertaken by government agencies and research organizations, interviews occur more or less simultaneously across the country. Those who conduct the interviews and those who analyze the results could not work effectively if they constantly had to check with one another about ambiguities in the questions or answers.

Questionnaires should also accommodate the characteristics of respondents. Will they see the point of a particular question? Might it offend them? Do they have enough information to answer usefully? Will they answer at all? A questionnaire's terminology might be unfamiliar; for instance, "What is your marital status?" might better be asked as "Are you single, married, in a marriage-like relationship, separated, or divorced?" Most surveys are preceded by pilot studies, which reveal problems with the survey not anticipated by the investigator. A pilot study is a trial run in which just a few people participate. Any difficulties can then be ironed out before the main survey takes place.

## Sampling

Often sociologists are interested in the characteristics of large numbers of individuals—for example, political attitudes of the American population as a whole. In such situations, researchers concentrate on a sample, or a small proportion of the overall group. Usually, the results from a properly chosen sample can be generalized to the total population. Studies of only 2,000–3,000 voters, for instance, can accurately indicate the attitudes and voting intentions of the entire population. But to achieve such accuracy, we need a representative sample; the group of individuals studied must be typical, or representative, of the population as a whole. Because sampling is highly complex, statisticians have developed rules for working out the correct size and nature of samples.

A particularly important procedure that ensures that a sample is representative is random sampling, in which every member of the sample population has the same probability of being included. The most sophisticated way of obtaining a random sample is to assign each member of the population a number and then use a computer to generate a random list of numbers from which the sample is derived—for instance, by picking every tenth number. Random sampling is often done by researchers doing large population-based surveys, aimed to capture the behaviors or attitudes of the overall U.S. population. For qualitative researchers interested in a particular population, such as street vendors or gangsters, it simply would not make sense to try to draw a random sample.

## Advantages and Disadvantages of Surveys

Surveys are widely used in sociological research for several reasons. Questionnaire responses can be more easily quantified and analyzed than material generated by most other research methods; large numbers of people can be studied; and, given sufficient funds, researchers can employ a specialized agency to collect the responses. The scientific method is the model for this kind of research since surveys give researchers a statistical measure of what they are studying.

However, many sociologists are critical of the survey method. They argue that findings whose accuracy may be dubious—given the relatively shallow nature of most survey responses—can nonetheless appear to be precise. Also, levels of nonresponse are sometimes high, especially now that so many people use cell phones and no longer have landlines at

home. Furthermore, some published studies are based on results derived from little more than half a sample, though normally there is an effort to recontact nonrespondents or to substitute them with other people. Although little is known about those who do not respond to surveys or who refuse to be interviewed, we do know that people often experience survey research as intrusive and time-consuming. One development that may hold great promise for learning about public opinion is the rise of new statistical techniques for surveying the online conversation that is taking place quite naturally on the Internet.

## A Recent Example of a Survey

In addition to the decennial census, the U.S. Census Bureau conducts the American Community Survey, contacting more than 3.5 million households to collect data on education, housing, and employment.

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One of the most famous contemporary surveys is the General Social Survey, which has been administered to Americans since 1972. It is sometimes called the "pulse of America," as it has tracked the social life of Americans for decades. Since 1985, however, it has also been administered outside the United States to obtain comparative data. One of

its most significant and controversial findings came from an analysis of the number of real-life “friends” Americans were reporting. The results suggested that Americans had fewer confidants than in the past and that a growing number couldn’t name a single person with whom they shared “important matters.” The implication was that Americans were growing lonelier (McPherson et al., 2006).

How did the researchers evaluate whether friendships were declining over time? What accounts for this decline? The study was based on face-to-face interviews with a nationally representative sample of nearly 1,500 American adults. All had participated in the long-running General Social Survey and were asked questions about their social networks. Specifically, they were asked to identify people with whom they had discussed “matters [that are] important to [them]” in the past six months. On average, they named 2.08 people in 2004, compared to 2.94 people in 1985. The proportion of respondents who reported that there was no one with whom they discussed important matters jumped from 10 percent in 1985 to 25 percent in 2004.

Some social scientists are not convinced that these findings support the claim that Americans are isolated or lonely. Rather, some argue that “weak” social ties, such as those with acquaintances, may be perfectly acceptable and rewarding for some people; these people may actually prefer to have many casual acquaintances rather than a handful of deep friendships. University of Toronto sociologist Barry Wellman (1994), for example, believes that the study offers important findings about “intimate ties,” but he questions whether these findings should be taken as evidence that Americans are lonely and isolated. Rather, he notes that people’s overall ties are actually increasing compared to previous decades, due in part to the Internet.

# Experiments

In the natural sciences and psychology, experiments are often used as they are considered the best method for ascertaining *causality*, or the influence of a particular factor on a study’s outcome. In an experimental situation, the researcher directly controls the circumstances being studied. In a typical experiment, people are randomly assigned to two groups. The first, called an *experimental group*, receives some special attention based

on the researcher's theory; the second, the *control group*, does not receive this attention. The subjects usually do not know to which group they have been assigned and seldom know the purpose of the experiment, though this is not always the case.

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## STATISTICAL TERMS

Research in sociology often makes use of statistical techniques in the analysis of findings. Some are highly sophisticated and complex, but those most often used are easy to understand. The most common are measures of central tendency (ways of calculating averages) and correlation coefficients (measures of the degree to which one variable relates consistently to another).

There are three methods of calculating averages, each of which has certain advantages and shortcomings. Take as an example the amount of personal wealth (including all assets, such as houses, cars, bank accounts, and investments) owned by 13 individuals. Suppose the 13 own the following amounts:

1. $0
2. $5,000
3. $10,000
4. $20,000
5. $40,000
6. $40,000
7. $40,000
8. $80,000
9. $100,000
10. $150,000
11. $200,000
12. $400,000
13. $10,000,000

The mean corresponds to the average, arrived at by adding together the personal wealth of all the people and dividing the result by the number of people in the sample (13). The total is $11,085,000; dividing this amount by 13, we calculate the mean to be $852,692.31. The mean is often a useful calculation because it is based on the whole range of data provided. However, the mean can be misleading when one case or a small

number of cases are very different from the majority. In this example, the mean is not in fact an appropriate measure of central tendency, because the presence of one very large figure, $10,000,000, skews the picture. One might get the impression, when using the mean to summarize these data, that most of the people own far more than they actually do.

In such instances, one of two other measures may be used. The mode is the figure that occurs most frequently in a given set of data. In our example, it is $40,000. The problem with the mode is that it doesn't take into account the overall distribution of the data—that is, the range of figures covered. The most frequently occurring case in a set of figures is not necessarily representative of the distribution as a whole and thus may not be a useful average. In this example, $40,000 is too close to the lower end of the figures.

The third measure is the median, which is the middle of any set of figures; here, this would be the seventh figure, again, $40,000. Our sample includes an odd number of figures, 13. If there were an even number—for instance, 12—the median would be calculated by taking the mean of the two middle cases, figures 6 and 7. As with the mode, the median gives no indication of the actual range of the data being measured.

Sometimes a researcher will use more than one measure of central tendency to avoid giving a deceptive picture of the average. More often, a researcher will calculate the standard deviation for the data in question. This is a way of calculating the degree of dispersal, or the range, of a set of figures—which in this case goes from $0 to $10,000,000.

Correlation coefficients offer a useful way of expressing how closely connected two (or more) variables are. When two variables correlate completely, we can speak of a perfect positive correlation, expressed as 1.0. When no relation is found between two variables—they have no consistent connection at all—the coefficient is 0.0. A perfect negative correlation, expressed as –1.0, exists when two variables are in a completely inverse relation to each other. Perfect correlations are never found in the social sciences. Correlations of the order of 0.6 or more, whether positive or negative, are usually regarded as indicating a strong degree of connection between whatever variables are being analyzed. Positive correlations on this level might be found between, say, social class background and voting behavior.

From his jail experiment, Philip Zimbardo concluded that behavior in prisons is influenced more by the nature of the prison itself than by the individual characteristics of those involved.

A classic example is the 1971 experiment carried out by Philip Zimbardo (1992), who set up a make-believe jail, randomly assigning some student volunteers to the role of guard and other volunteers to the role of prisoner. His aim was to see how role-playing would affect changes in attitude and behavior. The results shocked the investigators. Students who played guards quickly assumed an authoritarian manner; they displayed real hostility toward the prisoners, verbally abusing and bullying them. The prisoners, by contrast, showed a mixture of apathy and rebelliousness—a response often noted among inmates in actual prisons. These effects were so marked and the level of tension so high that the

experiment had to be called off at an early stage. The results, however, were important: Zimbardo concluded that behavior in prisons is more influenced by the nature of the prison situation than by the individual characteristics of those involved.

## Advantages and Disadvantages of Experiments

The advantage of experimental studies is that researchers can test a hypothesis under highly controlled conditions established by the researcher. The ability to control experimental conditions, however, is also the principal weakness of experimental studies, which in many ways are artificial. To the extent that the laboratory fails to duplicate a natural setting, it is difficult to generalize the results of laboratory experiments to the larger society. We can bring only small groups of individuals into a laboratory setting, and in such experiments people know they are being studied and may behave unnaturally. As a result, sociologists sometimes use field experiments, in which a real-life situation is simulated as accurately as possible.

## A Recent Example of an Experiment

Historically sociologists have conducted experiments in laboratories or the field, yet in recent years sociologists have been using web-based surveys to carry out experiments. This is the approach that sociologists Lauren Rivera and András Tilcsik (2019) used to explore whether college students' evaluations of their professors were affected by the professor's gender. Some prior studies had found evidence of gender bias, such that students gave female instructors lower teaching evaluation scores than they gave their male instructors. Rivera and Tilcsik (2019, p. 266) were interested in examining whether the rating scale used in the evaluations mattered. Would gender bias be more likely if students rated their teachers on a 10-point scale rather than a 6-point scale? A "10" rating on a 10-point scale, they thought, might trigger thoughts of intellectual brilliance; brilliance, they noted "is stereotypically associated with men rather than women." A "6" rating, by contrast, might not trigger such strong beliefs in brilliance.

To test their hypothesis that numeric rating systems are biased against women, the researchers generated a random sample of college students in

similar top-100 programs and asked them to read a transcript from an instructor's lecture. All students read the same lecture transcript, yet half were randomly assigned to read a transcript with a woman's name listed as instructor, whereas the other half were randomly assigned to read a transcript with a man's name listed as instructor. The research participants also were randomly assigned to evaluate the instructor on either a 6- or 10-point scale. As the researchers had hypothesized, they discovered that students were more likely to rate a male instructor higher than a female instructor when using a 10-point scale. However, when the 6-point scale was used, there were no significant gender differences between the ratings of the men and women instructors. These results have clear implications for real-world evaluations and suggest that 10-point scales may yield biased assessments (Carr et al., 2021).

# Comparative Historical Research

Comparative research is of central importance in sociology because it enables researchers to document whether social behavior varies across time and place and by one's social group membership. Most comparative work is quantitative in that researchers aim to document whether behaviors and attitudes change over time and place; thus, a consistent metric is required to make comparisons. Consider the American rate of divorce—the number of divorces per thousand married people. Divorce rates rose rapidly in the United States after World War II, reaching a peak in 1979. Since then, the divorce rate has dropped by nearly a quarter, with only 2.3 marriages per 1,000 (with 45 states reporting) ending in divorce in 2020 (National Center for Health Statistics, 2022)—a statistic expressing profound changes in the area of sexual relations and family life. Do these changes reflect specific features of American society? We can find out by comparing divorce rates in the United States with those in other countries. The comparison reveals that although the U.S. rate is higher than the rate in most other Western societies, the overall trends are similar.

Theda Skocpol's comparative research showed how major historical revolutions grew into much more radical movements than contemporaries could have predicted.

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The most influential way of doing comparative research is through historical research. One classic study that investigated a much longer

period and applied comparative research in a historical context was Theda Skocpol's *States and Social Revolutions* (1979), one of the best-known studies of social change. To produce a theory of the origins and nature of revolution grounded in detailed empirical study, Skocpol looked at processes of revolution in three historical contexts: the 1789 revolution in France, the 1917 revolution in Russia (which brought the Communists to power and established the Soviet Union, which was eventually dissolved in 1989), and the revolution of 1949 in China (which created Communist China).

By analyzing a variety of documentary sources, Skocpol was able to develop a powerful explanation of revolutionary change, one that emphasized underlying social structural conditions. She showed that social revolutions are largely the result of unintended consequences. Before the Russian Revolution, for instance, various political groups were trying to overthrow the regime, but none of these groups—including the Bolsheviks (Communists), who eventually came to power—anticipated the revolution that occurred. A series of clashes and confrontations gave rise to a process of social transformation that was much more radical than anyone had foreseen. At the time that Skocpol wrote, existing theories basically related the emergence of revolutions to the strength of social movements, and these to class relations. Skocpol showed, first, that state structures are as important as class relations and more important than the strength of the revolutionary movements; and second, that these state structures are heavily influenced by international events (for instance, revolutions come in the wake of a breakdown in state authority often due to lost international wars).

## A Contemporary Example of Comparative Research

Such studies as those pioneered by Theda Skocpol rely on qualitative methods of historical research, which depend on careful comparisons of a small number of cases. One of the costs of such approaches has been that sociologists have derived their understandings from some very famous revolutions or wars, while ignoring most of the world altogether.

In recent years, Andreas Wimmer has taken up an alternative approach to historical sociology. He uses formal modeling and statistical techniques to analyze hundreds of cases at the same time, rather than a few famous ones. Unlike scholars who go to the library and pull existing data off the

shelf, Wimmer has found it necessary to create his own datasets to answer age-old questions. In his approach, what happened in Haiti or in Latin America is equal in importance to what went on in Holland or in Europe more generally—though these latter places have tended to be studied much more frequently and thus count more heavily in existing theories. Wimmer's work therefore goes against the grain of most historical sociology that tends to focus mainly on Europe at the expense of Africa and the Americas. (It is not just Latin America that has figured infrequently in historical sociology; even North America is eclipsed by the usual focus on Europe.)

In his monumental book *Waves of War* (2012), Wimmer used this approach to study war as a sociological phenomenon, drawing on large original datasets. He found that if we look at all wars that occurred throughout history, we can see that a major shift has occurred. Prior to the nineteenth century, most wars were driven by conquest, or the desire of states to achieve or throw off a certain balance of power in their region. More recently, wars have been driven by ethnic and nationalist concerns. According to Wimmer, whereas Karl Marx once proclaimed that the twentieth century would be the age of revolutionary class struggle, it turned into the age of ethno-nationalist conflict. Using a global dataset of his own creation, Wimmer found that the existence of nationalist organizations in a territory more than doubles the probability of war at any time. It is unlikely that a researcher using a qualitative approach with small numbers of cases would have come up with such a finding, because such an approach would have focused on positive cases (i.e., on a handful of nationalist wars), rather than systematically comparing a large number of pre-nationalist contexts with nationalist ones.

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**CONCEPT CHECKS**

1. **What are the main advantages and limitations of ethnography as a research method?**
2. **Contrast the two types of questions commonly used in surveys.**
3. **What is a random sample?**
4. **Discuss the main strengths of experiments.**

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# Glossary

research methods

The diverse methods of investigation used to gather empirical (factual) material. Different research methods exist in sociology, but the most commonly used are fieldwork (or participant observation) and survey methods. For many purposes, it is useful to combine two or more methods within a single research project.

ethnography

The firsthand study of people using observation, in-depth interviewing, or both. Also called *fieldwork*.

participant observation

A method of research widely used in sociology and anthropology in which the researcher takes part in the activities of the group or community being studied.

survey

A method of sociological research in which questionnaires are administered to the population being studied.

population

The people who are the focus of social research.

pilot study

A trial run in survey research.

sample

A small proportion of a larger population.

representative sample

A sample from a larger population that is statistically typical of that population.

sampling

Studying a proportion of individuals or cases from a larger population as representative of that population as a whole.

random sampling

A sampling method in which a sample is chosen so that every member of the population has the same probability of being included.

experiment

A research method by which variables can be analyzed in a controlled and systematic way, either in an artificial situation constructed by the researcher or in a naturally occurring setting.

measures of central tendency

Ways of calculating averages.

correlation coefficients

Measures of the degree of correlation between variables.

mean

A statistical measure of central tendency, or average, based on dividing a total by the number of individual cases.

mode

The number that appears most often in a given set of data. This can sometimes be a helpful way of portraying central tendency.

median

The number that falls halfway in a range of numbers; a way of calculating central tendency that is sometimes more useful than calculating a mean.

standard deviation

A way of calculating the spread of a group of numbers.

degree of dispersal

The range or distribution of a set of figures.

comparative research

Research that compares one set of findings on one society with the same type of findings on other societies.

# 4 UNANSWERED QUESTIONS

**Understand how research methods generate controversies and ethical dilemmas for sociologists.**

Although the research methods of sociology have become quite advanced over the past 50 years, many open or unanswered questions still cause much disagreement among sociologists.

## Can Sociology Identify Causes and Effects?

One of the main problems faced in research methodology is the analysis of cause and effect. One difficult causal relationship to understand is an association in which one social context produces a certain effect. For example, if you live in a low-income neighborhood, some sociologists think you are more likely to be unemployed or to have health problems like diabetes or obesity. But is the neighborhood the cause, or is it the other way around? Isn't it also possible that the kinds of people who would be unemployed or in poor health tend to live in certain kinds of neighborhoods based on factors like affordability? Although one of the main tasks of sociology is to identify causes and effects, there is a crisis of confidence among many scholars that such a goal is not as easily attained as once thought.

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**READING A TABLE**

When reading sociological literature, you will often come across tables. They sometimes look complex but are easy to decipher if you follow the few basic steps outlined here; with practice, these will become automatic. (See Table 2.2 as an example.) Do not succumb to the temptation to skip over tables; they contain information in concentrated form that can be read more quickly than would be possible if the same material were expressed in words. By becoming skilled in the interpretation of tables, you will also be able to check how justified the conclusions a writer draws actually are.

1. Read the title in full. Tables frequently have long titles that represent the researcher's attempt to state accurately the nature of the information conveyed. The title of Table 2.2 gives, first, the subject of the data; second, the fact that the table provides material for comparison; and third, the fact that data are given only for a limited number of countries.
2. Look for explanatory comments, or notes, about the data. A source note at the foot of Table 2.2 indicates that the data were obtained from the Pew Research Center, a large international survey organization. A separate note states that data were not available for all nations for all years. Footnotes may say how the material was collected or why it is displayed in a particular way. If the researcher did not gather the data but instead used findings originally reported elsewhere, a source will be included. The source sometimes gives you some insight into how reliable the information is likely to be and tells you where to find the original data. In Table 2.2, the source note makes clear that the data have been taken from one international organization.
3. Read the headings along both the top and the left-hand side of the table. (Sometimes tables are arranged with "headings" at the foot rather than the top.) These tell you what type of information is contained in each row and column. In reading the table, keep in mind each set of headings as you scan the figures. In our example, the headings on the left name the countries involved, while those at the top refer to the proportion of the population who hold a "favorable" opinion of the United States and the years for which data are available.
4. Identify the units used; the figures in the body of the table may represent cases, percentages, averages, or other measures. Sometimes it may be helpful to convert the figures to a form more useful to you: If percentages are not provided, for example, it may be worth calculating them.
5. Consider the conclusions that might be reached from the information in the table. Most tables are discussed by the author, and what they have to say should, of course, be considered. But you should also ask what further issues or questions the data might suggest. How might you explain some of these declines? Or the sudden and precipitous drops?

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## How Can Social Research Avoid Exploitation?

All research involving human beings can pose ethical dilemmas. A key question for sociologists is whether research poses risks to subjects that are greater than the risks those subjects face in their everyday lives. For example, ethnographers and field researchers conducting research in areas with high crime rates potentially risk getting their subjects arrested with their writings or getting themselves arrested simply for observing and participating in the lives of the people whom they are trying to understand. Although a great deal of sensitivity to such issues exists in contemporary social science, one largely unanswered question relates to exploitation: Are social scientists benefiting at their subjects' expense? Most studies don't address such questions, and some social scientists are never forced to think seriously about them. The question of exploitation arises more in qualitative field studies than in quantitative research, but it must be considered whenever people's careers come to depend on the advancement of sociological knowledge. For example, if a scholar earns money on a book based on cooperation with research subjects, should that money be shared with the subjects?

**Table 2.2 OPINION OF THE UNITED STATES: COMPARISON OF SELECTED NATIONS**

Several interesting trends can be seen from the data in this table. First, the extent to which people hold favorable attitudes toward the United States varies considerably across nations. Second, although there are strong national and regional patterns of support for the United States, we also see considerable historical variation within nations. For example, in Egypt, close to one-third held favorable views in 2009, yet this proportion has steadily gone downward and bottomed out at 10 percent in 2014. Yet some nations show a steep and sudden drop rather than a steady decline. While two-thirds of Mexicans held a favorable view through much of the 2000s, this share had plummeted to 36 percent by 2019.

**PERCENTAGE OF PERSONS WHO HOLD A "FAVORABLE" (VS. "UNFAVORABLE") OPINION OF THE UNITED STATES**

| COUNTRY | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **China** | 34 | 41 | 47 | 58 | 44 | 43 | 40 | 50 | 44 | 50 | - | - | - | - | - | - |
| **Egypt** | 21 | 22 | 27 | 17 | 20 | 19 | 16 | 10 | - | - | - | - | - | - | - | - |
| **France** | 39 | 42 | 75 | 73 | 75 | 69 | 64 | 75 | 73 | 63 | 46 | 38 | 48 | 31 | 65 | 5 |
| **Germany** | 30 | 31 | 64 | 63 | 62 | 52 | 53 | 51 | 50 | 57 | 35 | 30 | 39 | 26 | 59 | 6 |
| **Indonesia** | 29 | 37 | 63 | 59 | 54 | - | 61 | 59 | 62 | - | 48 | 42 | 42 | - | - | - |
| **Japan** | 61 | 50 | 59 | 66 | 85 | 72 | 69 | 66 | 68 | 72 | 57 | 67 | 68 | 41 | 71 | 7 |
| **Jordan** | 20 | 19 | 25 | 21 | 13 | 12 | 14 | 12 | 14 | - | 15 | - | - | - | - | - |
| **Kenya** | 87 | - | 90 | 94 | 83 | - | 81 | 80 | 84 | 63 | 54 | - | 60 | - | - | - |
| **Mexico** | 56 | 47 | 69 | 56 | 52 | 56 | 66 | 63 | 66 | - | 30 | 32 | 36 | - | - | - |
| **Pakistan** | 15 | 19 | 16 | 17 | 12 | 12 | 11 | 14 | 22 | - | - | - | - | - | - | - |

| COUNTRY | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 20 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Poland** | 61 | 68 | 67 | 74 | 70 | 69 | 67 | 73 | 74 | 74 | 73 | 70 | 79 | - | - | 9 |
| **Russia** | 41 | 46 | 44 | 57 | 56 | 52 | 51 | 23 | 15 | - | 41 | 26 | 29 | - | - | - |
| **South Korea** | 58 | 70 | 78 | 79 | - | - | 78 | 82 | 84 | - | 75 | 80 | 77 | 59 | 77 | 8 |
| **Turkey** | 9 | 12 | 14 | 17 | 10 | 15 | 21 | 19 | 29 | - | 18 | - | 20 | - | - | - |
| **United Kingdom** | 51 | 53 | 69 | 65 | 61 | 60 | 58 | 66 | 65 | 61 | 50 | 50 | 57 | 41 | 64 | 6 |
| **United States** | 80 | 84 | 88 | 85 | 79 | 80 | 81 | 82 | 83 | 83 | 85 | 79 | 81 | - | - | - |

Source: Pew Research Center, 2022c.

Note: Data not available for all nations for all years.

For these reasons, scholars are increasingly using a method called community-based participatory research (CBPR). This is a collaborative approach to research that equitably involves both researchers and research subjects in the process and recognizes the distinctive strengths that each brings. Participants adhere to the call “nothing about us, without us,” recognizing that the voices of those being studied must be heeded—with participants weighing in on the research question, design, and implementation. In short, the people and communities who are affected by research have a right to influence *what* is researched and *how* this is done (Wilson et al., 2018).

# Can We Really Study Human Social Life in a Scientific Way?

To answer this question, we must first understand what *science* means. Science is the use of systematic methods of empirical investigation, the analysis of data, theoretical thinking, and the logical assessment of arguments to develop a body of knowledge about specific subject matter. According to this definition, sociology is a scientific endeavor.

However, sociology is not equivalent to a natural science. Unlike natural phenomena and animals, humans are self-aware beings who confer sense and purpose to what they do. We can’t describe social life accurately unless we grasp the concepts that people apply in their own behavior. For instance, to describe a death as a suicide means knowing what the person intended when he died. Suicide can occur only when an individual has self-destruction actively in mind. If he accidentally steps in front of a car and is killed, he cannot be said to have died by suicide.

The fact that we cannot study human beings in the same way as we can study objects in nature is an advantage to sociological researchers, who profit from being able to pose questions directly to those they study: other human beings. In other respects, sociology encounters difficulties not present in the natural sciences. People who are aware that their activities are being scrutinized may not behave normally; they may consciously or unconsciously portray themselves in a way that differs from their usual attitudes. They may even try to “assist” the researcher by giving the responses they believe she wants.

**CONCEPT CHECKS**

1. **How are the ethical dilemmas that social scientists face different from those that other researchers encounter in the physical or the biological sciences?**
2. **Why should sociologists be concerned about the exploitation of the people they study?**

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# Glossary

community-based participatory research (CBPR)
: A collaborative approach to research that equitably involves community members, researchers, and others in all aspects of the research process.

empirical investigation
: Factual inquiries carried out in any area of sociological study.

# THE BIG PICTURE

# Chapter 2

## Asking and Answering Sociological Questions

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**Exercises:** Thinking Sociologically

1. Suppose the dropout rate in your local high school increased dramatically. Faced with such a serious problem, the school board offers you a $500,000 grant to study the sudden increase. Following the recommended procedures outlined in the text, explain how you would conduct your research. What hypotheses might you test? How would you prove or disprove them?
2. Explain the advantages and disadvantages of documentary research. What will it yield that will be better than experimentation, surveys, and ethnographic fieldwork? What are its limitations compared with those approaches?

# BASIC CONCEPTS p. 35

## Learning Objectives

Learn how the standards of empirical social science research apply to sociology. Name the seven stages of the research process.

## Terms to Know

quantitative methods • qualitative methods • hypotheses

## Concept Checks

1. Compare and contrast qualitative and quantitative research methods.
2. What are the seven steps of the research process?
3. What is a hypothesis?

# ASKING AND ANSWERING SOCIOLOGICAL QUESTIONS: HISTORICAL CONTEXT p. 39

## Learning Objectives

Contrast Park's and Ogburn's visions of sociology as a science. Understand their influence on contemporary sociological research.

## Concept Checks

1. How did Park and Ogburn approach sociological research differently? In what ways did each sociologist influence researchers today?

# ASKING AND ANSWERING SOCIOLOGICAL QUESTIONS TODAY: RESEARCH METHODS p. 40

## Learning Objectives

Familiarize yourself with the methods available to sociological researchers, and recognize the advantages and disadvantages of each.

## Terms to Know

research methods • ethnography • participant observation • survey • population • pilot study • sample • representative sample • sampling • random sampling • experiment • measures of central tendency • correlation coefficients • mean • mode • median • standard deviation • degree of dispersal • comparative research

## Concept Checks

1. What are the main advantages and limitations of ethnography as a research method?
2. Contrast the two types of questions commonly used in surveys.
3. What is a random sample?
4. Discuss the main strengths of experiments.

# UNANSWERED QUESTIONS p. 50

## Learning Objectives

Understand how research methods generate controversies and ethical dilemmas for sociologists.

## Terms to Know

community-based participatory research (CBPR) • empirical investigation

## Concept Checks

1. How are the ethical dilemmas that social scientists face different from those that other researchers encounter in the physical or the biological sciences?
2. Why should sociologists be concerned about the exploitation of the people they study?

# Glossary

quantitative methods
: Approaches to sociological research that draw on objective and statistical data and often focus on documenting trends, comparing subgroups, or exploring correlations.

qualitative methods
: Approaches to sociological research that often rely on personal and/or collective interviews, accounts, or observations of a person or situation.

hypotheses
: Ideas or educated guesses about a given state of affairs, put forward as bases for empirical testing.

research methods
: The diverse methods of investigation used to gather empirical (factual) material. Different research methods exist in sociology, but the most commonly used are fieldwork (or participant observation) and survey methods. For many purposes, it is useful to combine two or more methods within a single research project.

ethnography
: The firsthand study of people using observation, in-depth interviewing, or both. Also called *fieldwork*.

participant observation
: A method of research widely used in sociology and anthropology in which the researcher takes part in the activities of the group or community being studied.

survey
: A method of sociological research in which questionnaires are administered to the population being studied.

population
: The people who are the focus of social research.

pilot study
: A trial run in survey research.

sample
: A small proportion of a larger population.

representative sample
: A sample from a larger population that is statistically typical of that population.

sampling

Studying a proportion of individuals or cases from a larger population as representative of that population as a whole.

random sampling

A sampling method in which a sample is chosen so that every member of the population has the same probability of being included.

experiment

A research method by which variables can be analyzed in a controlled and systematic way, either in an artificial situation constructed by the researcher or in a naturally occurring setting.

measures of central tendency

Ways of calculating averages.

correlation coefficients

Measures of the degree of correlation between variables.

mean

A statistical measure of central tendency, or average, based on dividing a total by the number of individual cases.

mode

The number that appears most often in a given set of data. This can sometimes be a helpful way of portraying central tendency.

median

The number that falls halfway in a range of numbers; a way of calculating central tendency that is sometimes more useful than calculating a mean.

standard deviation

A way of calculating the spread of a group of numbers.

degree of dispersal

The range or distribution of a set of figures.

comparative research

Research that compares one set of findings on one society with the same type of findings on other societies.

community-based participatory research (CBPR)

A collaborative approach to research that equitably involves community members, researchers, and others in all aspects of the research process.

empirical investigation

Factual inquiries carried out in any area of sociological study.

# PART II The Individual and Society

**We start our exploration of sociology by looking at the connections between individual development and culture and by analyzing types of societies from the past and present. Although our personalities and outlooks are influenced by our culture and society, we actively re-create and reshape the cultural and social contexts in which our activities occur. Chapter 3 examines the unity and diversity of human culture. We consider how human beings differ from and resemble nonhuman animals, and we analyze variations among human cultures. Chapter 4 discusses socialization, concentrating on how the human infant develops into a social being. Because socialization continues throughout the life course, we also analyze the relationships among young, middle-aged, and older people. Chapter 5 explores how people interact in everyday life and identifies the mechanisms people use to interpret what others say and do. The study of social interaction reveals a great deal about the larger social environment. Chapter 6 focuses on social groups, networks, and organizations, and how individuals interact in various settings. Chapter 7 looks at deviance and crime. We can learn about the way a population behaves by studying people whose behavior deviates from accepted patterns.**

# 3 Culture and Society

What is the effect of social media, such as TikTok or Facebook, on young adults' sense of themselves?

1. **always positive**
2. **more often positive than negative**
3. **more often negative than positive**
4. **always negative**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

**LEARNING OBJECTIVES**

1. **Basic Concepts** Know what culture consists of and recognize how it differs from society.
2. **The Sociological Study of Culture** Learn about the “cultural turn” and sociological perspectives on culture. Understand the processes that changed societies over time.
3. **Research Today: Understanding the Modern World** Recognize the legacies of colonialism and the effects of globalization on your own life and the lives of people around the world.
4. **Unanswered Questions** Understand the debate over the influence of biological and cultural factors on behavior. Learn how the internet and global culture influence local cultures.

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As the use of social media has flourished, researchers have documented that its extensive use can have both positive and negative effects. For instance, some evidence suggests that social media can have a positive effect on young people’s sense of social connection. Nearly 9 out of every 10 young Americans (ages 18–29) report engaging in social networking, enabling them to connect with a large number of “friends” and “followers” through posting status updates, videos, and photos on Facebook, TikTok, Instagram, Twitter, and similar social media sites (Perrin & Anderson, 2019). In fact, surveys of Americans of all ages have found that Facebook users report having a slightly greater number of close relationships than do average Americans, and in turn, they receive slightly more emotional support and companionship (Pew Research Center, 2011a; Pew Research Center, 2014b).

At the same time, researchers have documented that social media also can be used for bullying, social exclusion, and imposing unrealistic standards of physical attractiveness on young users (Craig et al., 2020; Harriger et al., 2023). Multiple studies of young adults have found that people who used social media more frequently felt slightly worse over time, whereas those who reported increased direct interaction with their friends tended to feel better over time (Kross et al., 2013; Shakya & Christakis, 2017).

One possible explanation has to do with self-esteem—how people feel about themselves. There is some evidence that as social media interaction increases, self-esteem decreases, especially among women (Leif et al., 2012). Frequent social media users often closely monitor the posts of their friends or the social influences they admire, making unfavorable

comparisons with their own lives. They are also more likely to be attentive to unfavorable responses to their own posts. One study found that young people with low self-esteem tend to complain about their lives on their social media pages, which in turn provokes negative responses, contributing to a downward emotional spiral (Forest & Wood, 2012).

Singer and songwriter Taylor Swift may not be a sociologist, but her insights square with the research:

> We are dealing with a huge self-esteem crisis. These girls are able to scroll pictures of the highlight reels of other people's lives, and they're stuck with the behind-the-scenes of their own lives. They wake up and they look at their reflection in the mirror, and they compare it to some filtered, beautiful photo of some girl who's really popular and seems like she has it all together. (NPR Staff, 2014)

The negative impacts go beyond unhealthy social comparisons. One recent study found that it can take less than 3 minutes after signing up for a TikTok account to see content related to suicide and about 5 more minutes to find a community promoting eating disorders (Center for Countering Digital Hate, 2022). This means that vast numbers of teens and young adults are exposed to potentially harmful messages, because two-thirds of U.S. teens use TikTok, spending an average of 80 minutes a day on the app.

The correct answer, unfortunately, is *c*: The effect of social media on young adults' sense of themselves is more often negative than positive.

These harmful effects aren't limited to the United States. China, now the world's second-largest economy (and rapidly closing in on the world's largest—the United States), claims more than one billion internet users (Internet World Stats, 2022 and has its own versions of TikTok (Douyin), Instagram (Xiaohongshu), Google (Baidu), Facebook (Renren), and Twitter (Sina Weibo). Although many popular U.S. social media sites are banned in China, China's own social media sites are widely used, with nearly two-thirds of Chinese over 18 plugged in (Pew Research Center, 2016a).

China's social media sites have been described by sociologist Liu Neng as "a place of escape" from the pressures of school, parental expectations,

and even (as long as politics are not discussed) government censorship (Rabkin, 2011). The widespread use of social media encourages self-expression, a trait far more common among Chinese youth than among their parents' generation (Rabkin, 2011). Young people in China increasingly rely on social media to form relationships, advertise their accomplishments, and flaunt their sense of worth. One study of university students in China found that students with higher self-esteem were more likely to post comments on social media sites; students with lower self-esteem presumably feared receiving unfavorable feedback (Wang et al., 2012). Chinese culture places an extremely high value on academic achievement and success in general.

Recent studies show that young people in China, as in the United States, can suffer mental health declines from excessive social media use (Wang et al. 2021). That's a key reason why during the COVID-19 pandemic, when concerns increased about Chinese youth's round-the-clock use of social media, Douyin added a youth mode, which allowed users under 18 to watch videos for no more than 40 minutes at a time and prevented them from accessing the app between 10 P.M. and 6 A.M. Some felt these limits did not go far enough, and in 2021 China implemented new rules for young gamers: They're now allowed to play online games for an hour a day between 8 P.M. and 9 P.M. on Fridays, Saturdays, Sundays, and official holidays.

The lives of everyone on the planet are becoming increasingly interdependent. Few places on earth can escape radio, television, air travel (and its throngs of tourists), smartphones, or the internet. A few generations ago, some people's ways of life might have been untouched by the rest of the world. Today, these same people use tools made in the United States, Europe, or Japan; wear clothing manufactured in China, the Dominican Republic, or Bangladesh; and share personal information and photos on social media sites. Most Western social media sites are banned in China, yet as content of sites like Douyin and Renren converges with that of their non-Chinese counterparts, a global culture seems to be emerging across the planet.

Some of the forces that contribute to such a global culture are discussed throughout this book:

- Television, which brings U.S. culture into homes throughout the world daily and which adapts other cultural products for the U.S.

audience

- The emergence of a unified global economy, with businesses whose factories, management structures, and markets span continents and countries
- "Global citizens," such as managers of large corporations (or university professors), who may spend so much time crisscrossing the globe that they identify with a global, cosmopolitan culture rather than with their own nation's culture
- A host of international organizations—including UN agencies, regional-trade and mutual-defense associations, multinational banks and other global financial institutions, and international labor and health organizations—that are creating a global political, legal, and military framework
- Electronic communications (smartphones, text messaging, email, the internet), which make instantaneous communication with almost any part of the planet an integral part of daily life in the business world
- The exploding use of smartphones and other devices, and the associated rise of social media such as TikTok and Instagram

Yet the emergence of a global culture is far from self-evident. In fact, there is considerable evidence to the contrary. The internet, while exposing billions of people around the world to ideas that often challenge some of their most cherished cultural beliefs and values, also has resulted in a strengthening of those beliefs and values in many places. Although the force of globalization can often seem to be irresistible, sweeping away everything in its path, globalization has also resulted in outright resistance to the homogenization of local cultures along European and North American lines.

In this chapter, we explore the nature of culture and society in their many forms, and how they are being reshaped by the many changes occurring in the world today.

# 1 BASIC CONCEPTS

**Know what culture consists of and recognize how it differs from society.**

The sociological study of culture and society began with Émile Durkheim in the nineteenth century. The work of early sociologists strongly reflected the values of highly educated Europeans who often assumed that "primitive" cultures were inferior and lagged behind modern European "civilization." However, two destructive world wars, fought largely among European countries that claimed to be the most "civilized" cultures on earth, helped discredit that belief. Sociologists now recognize that there are many different cultures and societies, each with distinctive characteristics. The task of social science is to understand this diversity, which is best done by avoiding value judgments.

Culture consists of the values the members of a group hold, the norms they follow, the material goods they create, and the languages and symbols they use to construct their understanding of the world, including both speech and writing. Some elements of culture, especially people's beliefs and expectations about one another and about the world they inhabit, are components of all social relations. Culture therefore refers to the ways of life of individual members or groups within a society—their manner of dress, their marriage customs and family life, their patterns of work, their religious ceremonies, and their leisure pursuits. The concept also covers the goods they create—bows and arrows, plows, factories and machines, computers, books, and dwellings. We should think of culture as a "design for living" or a "tool kit" of practices, knowledge, and symbols acquired through learning, rather than by instinct, that enable people to live in society (Kluckhohn, 1949; Swidler, 1986).

A society is a system of interrelationships that connects individuals. The word *society*—like the word *social*—derives from a Latin term for the ties that bind people together, ties that make sustained human interaction possible. Such bonds can be informal, such as friendship or family, or formal, such as religious organizations, businesses, or entire nations. One characteristic of societies, at least as sociologists see them, is that they are relatively enduring over time. For this to occur, societies require some

degree of common culture—a set of shared values to guide behavior. No society could exist without culture, and conversely, no culture could exist without a society.

# Cultural Universals

When common features of human behavior are found in virtually all societies, they are called cultural universals. Among the cultural characteristics shared by all societies, two in particular stand out. All cultures incorporate ways of communicating and expressing meaning, and all cultures depend on material objects in daily life. There is no known culture without a grammatically complex language, or that lacks physical objects that share common cultural meanings. Additionally, all cultures possess some recognizable form of family system in which there are values and norms associated with the care of children. The institution of marriage is a cultural universal, as are religious rituals and property rights—although what constitutes marriage, how many spouses one is entitled to, and what is considered acceptable behavior both within and outside the marriage can vary considerably from culture to culture. All cultures also practice some form of incest prohibition—the banning of sexual relations between close relatives. Other cultural universals include art, dance, bodily adornment, games, gift-giving, joking, and rules of hygiene.

Marriage is an example of a cultural universal, a value shared by all human cultures.

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Variations clearly exist within each category. Consider the prohibition against incest. Most often, incest is regarded as sexual relations between members of the immediate family, but among some peoples it includes cousins and, in some instances, all people bearing the same family name. There have also been societies in which a small proportion of the population engages in incestuous practices. This practice was the case within ancient Egypt's ruling class, in which brothers and sisters were permitted to have sex with each other.

Sociologists and anthropologists distinguish between two forms of culture: nonmaterial culture, the cultural ideas that are not themselves physical objects, and material culture, the physical objects that a society creates. We discuss each form of culture in turn.

# Nonmaterial Culture

Nonmaterial culture comprises the nonphysical components of culture, including values and norms, symbols, language, and speech and writing.

## Values and Norms

Values are abstract ideals. For example, being faithful to one marriage partner is a prominent value in most Western societies, but in some other cultures, a person may have several wives or husbands. Some cultures value individualism, whereas others emphasize shared needs. Is it possible to describe an "American" culture? Although the United States is culturally diverse, we can identify several characteristics of a uniquely American culture. First, it reflects a particular range of values shared by many, if not all, Americans, such as the belief in the merits of individual achievement or in equality of opportunity. Second, these values are connected to specific norms: For example, it is usually expected that people will work hard to achieve occupational success (Bellah et al., 1985; Parsons, 1951/1964). Third, American culture involves the use of material artifacts created mostly through modern industrial technology, such as cars, mass-produced food, clothing, and so forth.

People in China hold a much stronger belief in the importance of collective effort. Modesty is a strongly held virtue, as reflected in the adage (attributed to Confucius) “When walking in the company of three, there must be one I can learn from.” Although Americans who boast about their self-made success might seem vulgar to the Chinese, some Chinese seem to be changing their values in this regard: *China’s Got Talent* premiered in 2010 on a Shanghai TV station.

Even within American society, values may conflict. Some groups or individuals might value traditional religious beliefs, whereas others might favor progress and science. Some people might prefer lavish material comfort, whereas others might favor simplicity. In a modern age characterized by the global movement of people, ideas, goods, and information, cultural values will inevitably conflict. Sociological research suggests that such conflicts foster a sense of frustration and isolation (Bellah et al., 1985).

The tension between subgroup values and national values came to a head in 2011 when the French government banned Muslim women from wearing full-face veils in public.

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Norms are principles or rules of social life that everyone is expected to observe. Norms of behavior in marriage include the way husbands and wives are supposed to behave toward their in-laws: In some societies, they are expected to develop a close relationship; in others, they keep a

clear distance. Like the values they reflect, norms vary across cultures. In the United States, for example, while a woman might wear a hat if it is in fashion, most do not regularly cover their hair and neck with a headscarf. Some more traditional Muslim cultures have a norm calling for women to wear headscarves as a religiously required sign of modesty. While a few highly conservative Muslim cultures might enforce this rule on some women who prefer to dress otherwise, cultural norms regarding dress are often widely accepted; as a result, women in traditional Muslim cultures often prefer to wear headscarves and other forms of more traditional clothing.

Cultural conflict occurs when norms perceived as culturally incompatible collide. The use of veils by Muslim women in predominantly Christian countries, for example, has led to cultural conflict in France (which in 2011 began to enforce a ban on veils in public places) and some other European countries with large immigrant populations from the Middle East or North Africa. In the United States, Europe, and even predominantly Muslim Turkey, religious Muslim women who insist on wearing headscarves often clash with prevailing beliefs that emphasize the separation of church and state, or the belief that a headscarf symbolizes women's subservience to male-generated beliefs and thus threatens women's rights (Elver, 2012).

Norms, like the values they reflect, also change over time. For example, beginning in 1964, with a U.S. surgeon general's report that linked smoking with serious health problems, the U.S. government waged a highly effective campaign to discourage people from smoking. A strong social norm favoring smoking—once associated with independence, sex appeal, and glamour—has now given way to an equally strong social norm depicting smoking as unhealthful, unattractive, and selfish. In 2017, only 14 percent of American adults smoked (Centers for Disease Control and Prevention, 2018), one-third of the percentage in 1964, when the surgeon general's report was issued.

## Symbols

The symbols expressed in speech and writing are the chief ways in which cultural meanings are formed and expressed. But they are not the only ways. Both material objects and aspects of behavior can generate meanings. A signifier is any vehicle of meaning—any set of elements

used to communicate. The sounds made in speech are signifiers, as are the marks made on paper or other materials in writing. Other signifiers include dress, pictures or visual signs, modes of eating, forms of building or architecture, and many other material features of culture (Hawkes, 1977). Styles of dress, for example, normally signify differences between men and women. Until relatively recently, women in American culture wore skirts and men pants. In some other cultures, this practice is reversed: Women wear pants and men skirts (Leach, 1976).

Semiotics—the analysis of nonverbal cultural meanings—opens up a fascinating field for sociology because it allows us to contrast the ways in which different cultures are structured. For example, the buildings in cities are not simply places where people live and work; they often have a symbolic character. In traditional cities, the main temple or church usually sat on high ground in or near the city center to symbolize the all-powerful influence of religion. In modern societies, by contrast, the skyscrapers of big business often occupy that symbolic position. Of course, material culture is not simply symbolic but also includes actual, practical objects vital for catering to physical needs—for example, the tools or technology used to acquire food, make weaponry, construct dwellings, and so forth. We have to study both the practical and the symbolic aspects of material culture to understand it completely.

## Language

Language demonstrates both the unity and the diversity of human culture because there are no cultures without language, yet there are thousands of languages spoken in the world. Although languages with similar origins have words in common with one another—for example, German and English—most major language groups have no words in common at all.

Language is involved in virtually all our activities. In the form of ordinary speech, it is the means by which we organize most of what we do. (We will discuss the importance of talk and conversation in social life in Chapter 5.) However, language is involved not just in mundane activities but also in ceremony, religion, poetry, and many other spheres. One of its most distinctive features is that it allows us to extend the scope of our thought and experience. Using language, we can convey information about events remote in time or space and can discuss things

we have never seen. We can develop abstract concepts, tell stories, and make jokes.

Languages—indeed, all symbols—are representations of reality. Symbols may signify things we imagine, such as mathematical formulas or fictitious creatures, or they may represent (that is, "re-present," or make present again in our minds) things initially experienced through our senses. Human behavior is oriented toward the symbols we use to represent "reality," rather than toward the reality itself—and these symbols are determined within a particular culture. When you see a four-footed furry animal, for example, you must determine which cultural symbol to attach to it. Do you decide to call it a dog, a wolf, or something else? If you determine it is a dog, what cultural meaning does that convey? In American culture, dogs are typically regarded as household pets and lavished with affection. In Guatemalan Indian culture, however, dogs are more often seen as guards or scavengers and are treated with an indifference that might seem cruel to Americans. Among the Akha of northern Thailand, dogs are seen as food, and they are treated accordingly. The diversity of cultural meanings attached to the word *dog* thus requires an act of interpretation.

In the 1930s, the anthropological linguist Edward Sapir and his student Benjamin Lee Whorf advanced the linguistic relativity hypothesis, which argues that language influences our perceptions of the world because we are more likely to be aware of things if we have words for them (Lucy, 1997; Wolff & Holmes, 2011). For example, expert skiers and snowboarders use terms such as *black ice*, *corn*, *powder*, and *packed powder* to describe different snow and ice conditions to more readily perceive potentially life-threatening situations that would escape the notice of a novice. In a sense, then, experienced winter athletes have a different perception of the world—or, at least, a different perception of the alpine slopes—than do novices.

Language also helps give permanence to a culture and identity to a people. Language outlives any particular speaker or writer, affording a sense of history and cultural continuity. It may seem that the English language is becoming increasingly global, as a primary language of both business and the internet. Yet local attachments to language persist, often out of cultural pride. For example, the French-speaking residents of the Canadian province of Québec are so passionate about their linguistic heritage that they often refuse to speak English, the dominant language of

Canada, and they periodically seek political independence from the rest of Canada. Minority languages are sometimes even outlawed by the majority government: Turkey restricts the use of the Kurdish language; similarly, the “English-only” movement in the United States seeks to restrict the language of education and government to English, even though numerous other languages are spoken throughout the country.

## Speech and Writing

All societies use speech as a vehicle of language. However, there are other ways of expressing language—most notably, writing. The invention of writing marked a major transition in human history. Writing first began as the drawing up of lists: Marks made on wood, clay, or stone served to keep records about significant events, objects, or people. For example, a mark, or sometimes a picture, might represent each tract of land possessed by a particular family or set of families (Gelb, 1952). Writing began as a means of storing information and as such was closely linked to the administrative needs of the early civilizations. A society that possesses writing can locate itself in time and space. Documents can be accumulated that record the past, and information can be gathered about present-day events and activities.

Written documents, or texts, have qualities distinct from the spoken word. The effect of speech is limited to the contexts in which words are uttered. Ideas and experiences can be passed down through generations in cultures without writing, but only by word of mouth. Texts, on the other hand, can endure for thousands of years, and through them, all varieties of writers from past ages can address us directly. This is why documentary research is so important to historians.

# Material Culture

Material culture consists of the physical objects that a society creates that influence the ways in which people live. These include consumer goods, from clothes to cars to houses; the tools and technologies used to make those goods, from sewing machines to computerized factories; and the towns and cities that serve as places for people to live and work. A central aspect of a society’s material culture is technology.

Today, material culture is rapidly becoming globalized, largely through modern information technology such as computers, smartphones, and the internet. Although the United States has been in the forefront of this technological revolution, the manufacturing of new technology takes place around the globe. The iPhone, for example, contains hundreds of components that are sourced from some 200 manufacturers across the planet, embodying technology developed in Japan, South Korea, Taiwan, Europe, and the United States (Minasians, 2017). Another example of the globalization of material culture is the way that classrooms and department stores the world over increasingly resemble one another, and the fact that McDonald's restaurants are now found on nearly every continent.

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**CONCEPT CHECKS**

1. **Describe the main elements of culture.**
2. **What role does culture play in society?**
3. **Identify three examples of cultural universals.**
4. **What is the linguistic relativity hypothesis?**

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# Glossary

culture
: The values, norms, and material goods characteristic of a given group. Like the concept of society, the notion of culture is widely used in sociology and the other social sciences (particularly anthropology). Culture is one of the most distinctive properties of human social association.

society
: A group of people who live in a particular territory, are subject to a common system of political authority, and are aware of having a distinct identity from other groups. Some societies, such as hunting and gathering societies, are small, numbering no more than a few dozen people. Others are large, numbering millions. Modern Chinese society, for instance, has a population of more than a billion people.

cultural universals

Values or modes of behavior shared by all human cultures.

marriage

A socially approved sexual relationship between two individuals. Marriage historically has involved two persons of opposite sexes, but in the past decade, marriage between same-sex partners has been legalized in a growing number of states and nations throughout the world. Marriage normally forms the basis of a family of procreation—that is, it is expected that the married couple will produce and bring up children.

nonmaterial culture

Cultural ideas that are not themselves physical objects.

material culture

The physical objects that a society creates that influence the ways in which people live.

values

Ideas held by individuals or groups about what is desirable, proper, good, and bad. What individuals value is strongly influenced by the specific culture in which they happen to live.

norms

Rules of conduct that specify appropriate behavior in a given range of social situations. A norm either prescribes a given type of behavior or forbids it. All human groups follow definite norms, which are always backed by sanctions of one kind or another, varying from informal disapproval to physical punishment.

symbol

One item used to stand for or represent another, as in the case of a flag symbolizing a nation.

signifier

Any vehicle of meaning and communication.

semiotics

The study of the ways in which nonlinguistic phenomena can generate meaning, as in the example of a traffic light.

language

The primary vehicle for meaning and communication in a society, language is a system of symbols that represent objects and abstract thoughts.

linguistic relativity hypothesis

A hypothesis, based on the theories of Edward Sapir and Benjamin Lee Whorf, that perceptions are relative to language.

# 2 THE SOCIOLOGICAL STUDY OF CULTURE

**Learn about the "cultural turn" and sociological perspectives on culture. Understand the processes that changed societies over time.**

It is easy to assume that we are so thoroughly shaped by culture that we never escape its influence. In fact, that is how most sociologists thought about culture until the 1990s (Inglis, 2005). Most sociologists took for granted the importance of culture without seriously considering how it worked in daily life.

## Culture and Change: A "Cultural Turn" in Sociology?

The phrase cultural turn describes sociology's recent emphasis on understanding the role of culture in daily life. One result has been to challenge the assumption that culture rigidly determines our values and behaviors. Instead, the sociologist Ann Swidler (1986) has characterized culture as a "tool kit" from which people select different understandings and behaviors. Thus, some people can choose to dye their hair, wear nose rings, and tattoo their bodies but still accept their parents' traditional ideas about sexual restraint. Because people participate in many different (and often conflicting) cultures, the tool kit can be quite large and its contents varied (Bourdieu, 1990; Sewell, 1992; Tilly, 1992).

Our cultural tool kits include a variety of "scripts" that we can draw on—and even improvise on—to shape our beliefs, values, and actions. The more appropriate the script is to a particular set of circumstances, the more likely we are to follow it—and recall events that conform to it long after they have occurred (D'Andrade, 1995; DiMaggio, 1997). For example, imagine that you are a woman walking alone in an unfamiliar city late at night and suddenly encounter a male stranger who begins to cross the street toward you, stating as he approaches, "Excuse me, may I ask you a question?" Your choice of cultural script will shape your response. A popular cultural script—honed by film and television entertainment, true

crime TV, and politicians—is to fear such encounters, especially if you are female (Glassner, 1999). As a result, instead of hearing him out, you quickly turn and head for the safety of a nearby all-night restaurant. Later, when retelling the story, you might recall the stranger as taller and more menacing than he was—traits consistent with U.S. cultural scripts about such encounters.

Now imagine that you are the man in this encounter, perhaps an out-of-town businessman trying to find your hotel in an unfamiliar neighborhood. You see a woman walking on the other side of the street, and as you cross to ask for directions, she turns and disappears into a restaurant. Your experience would be very different from that of the woman: You are concerned about the late hour, worried about being lost, and stunned by her response. Perhaps when you return home you will describe this event as evidence that people in this city are cold and indifferent to strangers.

In studying this case in light of the cultural turn, sociologists would attempt to understand the different cultural scripts involved and why each person might have chosen those scripts. How did physical appearance influence their different experiences? What words were spoken, and what meanings did those words convey? What did the two people's "body language" communicate? Sociologists would also consider alternative scripts that might have altered the experience of each participant. For example, the woman might have chosen the script of "Good Samaritan," viewing the approaching stranger as potentially in need of assistance and thereby offering to help. Or the man might have recognized that a lone woman would feel threatened and instead have chosen a less confrontational script—perhaps remaining on his side of the street and beginning with a soft-spoken "Excuse me, can you please tell me the way to my hotel? I seem to be lost."

The cultural turn in sociology reveals that there is no single "reality" to social encounters and that multiple cultural scripts can play out in any situation. The challenge of sociology is to understand people's differing realities, the scripts that they follow, and the reasons they choose one set of scripts over another (Bonnell & Hunt, 1999; Chaney, 1994; Glassner, 1999; Hays, 2000; Long, 1997; Seidman, 1997; Sewell, 1999; Smith & West, 2000; Swidler, 2001).

Sociologist Wendy Griswold has identified four elements of any culture that constitute a complex cultural system, which she terms the "cultural diamond," with the four elements representing the four points of a

diamond. These four elements include both material and nonmaterial cultural objects; the creators or producers of cultural objects; the receivers of cultural objects, who don't just passively accept these objects but rather actively make meaning out of them; and the larger social world, comprising the economic, political, social, and cultural patterns in any particular society. Each of the four elements of the cultural diamond interact with the other three, resulting in six possible linkages that shape a society's culture. Cultural sociology, as Griswold sees it, is especially concerned with one of the six linkages: that between cultural objects (both material and nonmaterial) and the social world (Griswold, 2013).

# Early Human Culture: Greater Adaptation to Physical Environment

Human culture and human biology are intertwined. Understanding how culture is related to the physical evolution of the human species can, in turn, help us understand the central role of culture in shaping our lives. To understand the forms of society that existed before modern industrialism, we call on the historical dimension of the sociological imagination.

Compare the material culture of (left) the Inuit building an igloo ir Canada and (right) an Embera man hollowing out a canoe.

Given both the archaeological evidence and the similarities in blood chemistry and genetics between chimpanzees and humans, scientists believe that humans evolved from apelike creatures on the African continent some 4 million years ago. The first evidence of humanlike culture dates back 2 million years. Early humans fashioned stone tools, hunted animals and gathered nuts and berries, harnessed the use of fire, and established a highly cooperative way of life. Because early humans planned their hunts, they must have had some ability for abstract thought.

Culture enabled early humans to compensate for their physical limitations, such as lack of claws and sharp teeth and slower running speed relative to that of other animals (Deacon, 1998). It freed humans from dependence on the instinctual responses to the environment that are characteristic of other species. The larger, more complex human brain permitted greater adaptive learning in dealing with major environmental changes such as the Ice Age. For example, humans figured out how to build fires and sew clothing for warmth. Through greater flexibility, humans could survive unpredictable challenges in their surroundings and shape the world with their ideas and their tools. In an instant of geological time, we became the dominant species on the planet.

Yet early humans were closely tied to their physical environment because they lacked the technological ability to modify their surroundings in significant ways (Bennett, 1976; Harris, 1975, 1978, 1980). Their ability to secure food and make clothing and shelter depended on physical resources close at hand. Cultures varied widely according to geographic and climatic conditions, from deserts to rain forests, the frozen Arctic to temperate areas. Human inventiveness spawned a rich tapestry of cultures around the world. As you will see later in this chapter, however, modern technology and other forces of globalization pose both challenges and opportunities for future global cultural diversity.

## The Earliest Societies: Hunters and Gatherers

For all but a tiny part of our existence on this planet, human beings have lived in small hunting and gathering societies, often numbering no more than 30 or 40 people (see Table 3.1). Hunters and gatherers gain their livelihood from hunting, fishing, and gathering wild edible plants. Such cultures still exist in some parts of the world, such as in India, a few arid parts of Africa, Australia, the Arctic, and the jungles of Brazil and New Guinea. Most such cultures, however, have been destroyed or absorbed by the spread of Western culture. Although estimates are difficult to calculate, research suggests that far less than 0.1 percent of the world's population support themselves through hunting and gathering.

**Table 3.1 TYPES OF HUMAN SOCIETY**

| TYPE | PERIOD OF EXISTENCE | CHARACTERISTICS |
|---|---|---|
| **Hunting and gathering societies** | 50,000 B.C.E. to the present<br><br>Now on the verge of complete disappearance. | Consist of small numbers of people gaining their livelihood from hunting, fishing, and the gathering of edible plants.<br><br>Few inequalities.<br><br>Differences of rank limited by age and gender. |
| **Agrarian societies** | 12,000 B.C.E. to the present<br><br>Most are now part of larger political entities and are losing their distinct identity. | Based in small rural communities, without towns or cities.<br><br>Livelihood gained through agriculture, often supplemented by hunting and gathering.<br><br>Stronger inequalities than among hunters and gatherers.<br><br>Ruled by chiefs. |

| TYPE | PERIOD OF EXISTENCE | CHARACTERISTICS |
|---|---|---|
| **Pastoral societies** | 12,000 B.C.E. to the present<br><br>Today mostly part of larger states; their traditional ways of life are being undermined. | Range from a few hundred people to many thousands.<br><br>Depend on the tending of domesticated animals for their subsistence.<br><br>Marked by distinct inequalities.<br><br>Ruled by chiefs or warrior kings. |
| **Traditional societies or civilizations** | 6000 B.C.E. to the nineteenth century<br><br>All traditional states have disappeared. | Very large in size, some numbering millions of people (though small compared with industrialized societies).<br><br>Some cities exist, in which trade and manufacturing are concentrated.<br><br>Based largely on agriculture.<br><br>Major inequalities exist among different classes.<br><br>Distinct apparatus of government headed by a king or emperor. |

Compared with larger societies—particularly modern societies such as the United States—there was little inequality in most hunting and gathering groups; everyone lived in what would today be regarded as extreme poverty. Because necessary material goods were limited to weapons for

hunting, tools for digging and building, traps, and cooking utensils, there was little difference among members of the society in the number or kinds of material possessions; there were no divisions between rich and poor. Differences in position or rank were based on age and gender; men were almost always the hunters, while women gathered wild crops, cooked food, and brought up the children.

The oldest and most experienced men usually had an important say in major decisions affecting the group, but differences in power were much less distinct than in larger types of society. Hunting and gathering societies were usually participatory rather than competitive: All adult male members assembled in the face of important decisions or crises.

Hunters and gatherers moved about a good deal within fixed territories, around which they migrated from year to year. Because they lacked animal or mechanical means of transport, they could take very few goods or possessions with them. Many hunting and gathering communities did not have a stable membership; people often moved between camps, or groups split up and joined others within the same territory.

Hunters and gatherers had little interest in developing material wealth; their main concerns were with religious values and ritual activities. Members participated regularly in elaborate ceremonies and spent time preparing the dress, masks, paintings, or other sacred objects used in such rituals.

Hunters and gatherers are not merely primitive peoples whose ways of life no longer hold interest for us. Studying their cultures demonstrates that some of our institutions are far from natural features of human life. We shouldn't idealize the circumstances in which hunters and gatherers lived, but the lack of inequalities in wealth and power and the emphasis on cooperation are reminders that the world of modern industrial civilization cannot necessarily be equated with progress.

## Pastoral and Agrarian Societies

About 15,000 years ago, some hunting and gathering groups started raising domesticated animals and cultivating fixed plots of land as their means of livelihood. Pastoral societies relied mainly on domesticated livestock, whereas agrarian societies grew crops (practiced agriculture). Some societies had mixed pastoral and agrarian economies.

Depending on the environment, pastoralists reared cattle, sheep, goats, camels, or horses. Some pastoral societies exist in the modern world, especially in areas of Africa, the Middle East, and Central Asia. They are usually found in regions of dense grasslands or in deserts or mountain regions. Such regions are not amenable to agriculture but may support livestock.

At some point, hunting and gathering groups began to sow their own crops rather than simply collect those growing in the wild. This practice developed as horticulture, in which the group cultivated small gardens by the use of simple hoes or digging instruments. Like pastoralism, horticulture provided a more reliable food supply than hunting and gathering and therefore could support larger communities. Because they were not on the move, people who practiced horticulture could develop larger stocks of material possessions than people in either hunting and gathering or pastoral communities.

From about 6000 B.C.E. onward, we find evidence of societies larger than, and different from, any that existed before. These societies, which were based on settled agriculture and the development of cities, led to pronounced inequalities in wealth and power, and were ruled by kings or emperors. Because writing was present and science and art flourished, these societies are often called civilizations.

The earliest civilizations developed in the Middle East, mostly in fertile river areas. The Chinese Empire originated in about 1800 B.C.E., at which time powerful states also existed in what are now India and Pakistan. By the fifteenth century C.E., large civilizations also existed in Mexico and Latin America, including the Aztecs of the Mexican peninsula and the Incas of Peru.

Most traditional (premodern) civilizations were also empires: They conquered and incorporated other peoples (Kautsky, 1982). This was true, for instance, of traditional Rome and China. At its height in the first century C.E., the Roman Empire stretched from Britain in northwest Europe to beyond the Middle East. The Chinese Empire covered most of the massive region of East Asia now occupied by modern China.

# Industrial Societies

What happened to destroy the forms of society that dominated the whole of history up to two centuries ago? The answer, in a word, is industrialization —the emergence of machine production based on the use of inanimate power resources (such as steam or electricity). The industrialized, or modern, societies differ from any previous type of social order in several key respects, and their development has had consequences stretching far beyond their European origins.

Industrialization originated in eighteenth-century Britain as a result of the Industrial Revolution, a complex set of technological changes between 1750 and 1850 that affected people's means of gaining a livelihood. These changes included the invention of new machines (such as the spinning jenny for creating yarn, patented in 1770), the harnessing of power resources (especially water and steam) for production, and the use of science to improve production methods. Because discoveries and inventions in one field lead to more in others, the pace of technological innovation in industrialized societies is extremely rapid compared with that of traditional social systems.

In even the most advanced of traditional civilizations, most people worked on the land. By contrast, in industrialized societies today, the majority of the employed population works in factories, offices, or shops. And slightly more than half of all people (55 percent) live and work in urban areas (UN Department of Economic and Social Affairs, 2018a). The largest cities are vastly larger than the urban settlements of traditional civilizations. In cities, social life becomes impersonal and anonymous, and many encounters are with strangers. Large-scale organizations, such as business corporations or government agencies, influence the lives of virtually everyone.

The political systems of modern societies are more developed than forms of government in traditional states; in the latter, monarchs and emperors had little influence on the customs of most of their subjects, who lived in self-contained villages. With industrialization, transportation and communication became much more rapid, promoting a more integrated "national" community.

The industrialized societies were the first nation-states—political communities with clearly delimited borders and shared culture, rather than vague frontier areas that separated traditional states. Nation-state governments have extensive powers over many aspects of citizens' lives, framing laws that apply to all those living within their borders. The United

States is a nation-state, as are virtually all other societies in the world today.

The application of industrial technology not only has served peaceful processes of economic development but also has altered ways of waging war, creating weaponry and modes of military organization much more advanced than those of nonindustrial cultures. Together, superior economic strength, political cohesion, and military superiority account for the worldwide spread of Western culture over the past two centuries.

Sociology first emerged as a discipline as industrial societies developed in Europe and North America, and it was strongly influenced by the changes taking place at that time. As we saw in Chapter 1, the major nineteenth-century sociological theorists (Durkheim, Marx, and Weber) all sought to explain these sweeping changes. While they differed in their understanding and their predictions about the future, all shared a belief that industrial society was here to stay and, as a result, the future would in many ways resemble the past.

For Durkheim, this vision of the future meant the increasing importance of what he termed "organic solidarity"—a growing division of labor, with all members of society engaged in highly specialized roles (or *functions*, in Durkheim's terminology), with functional interdependence resulting in ties that bind the members of society together. Marx, on the other hand, argued that industrial society's division into social classes hampered its technological potential because the capitalist class reaped all the benefits of advanced technologies at the expense of the working class. In his view, a working-class revolution was required to create a classless society, a new form of industrial society in which everyone prospered. Weber focused on the rise of what he termed *rational-legal society*, best seen in modern bureaucracies. This he viewed as a highly efficient form of social organization that was, unfortunately, simultaneously destructive of human freedom and potential—or, as he referred to it in his memorable phrase, an "iron cage." While Weber anticipated that from time to time charismatic leaders might emerge to challenge this trend, ultimately their power would become routinized, and the long march of the bureaucrat would continue.

While Durkheim, Marx, and Weber's theoretical understanding of the emerging industrial society still has relevance, contemporary theorists have shed new light on the ways in which culture and society are changing in the modern world. We're experiencing a transition to a new type of society that is no longer based primarily on manufacturing or low-paying service

work, but rather relies increasingly on information technology, artificial intelligence, and robotics to replace human labor in a growing range of jobs—from servers in fast-food restaurants to highly skilled engineers, accountants, and other professionals. We are entering, in other words, a "postindustrial" society, a topic we will discuss in detail in Chapter 14. In the next section of this chapter, we consider recent research on some of the current issues that confront global societies.

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**CONCEPT CHECKS**

1. **Compare the three main types of premodern societies.**
2. **What transformations led to the development of civilizations?**
3. **What does the concept of industrialization mean?**
4. **How has industrialization weakened traditional social systems?**

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# Glossary

cultural turn
: Sociology's recent emphasis on the importance of understanding the role of culture in daily life.

hunting and gathering societies
: Societies whose mode of subsistence is hunting animals, fishing, and gathering edible plants.

pastoral societies
: Societies whose subsistence derives from the rearing of domesticated animals.

agrarian societies
: Societies whose means of subsistence are based on agricultural production (crop growing).

industrialization
: The process of the machine production of goods.

industrialized societies
: Strongly developed nation-states in which the majority of the population works in factories or offices rather than in agriculture, and most people live in urban areas.

nation-states
: Particular types of states, characteristic of the modern world, in which governments have sovereign power within defined territorial areas,

and populations are citizens who know themselves to be part of single nations.

# 3 RESEARCH TODAY: UNDERSTANDING THE MODERN WORLD

**Recognize the legacies of colonialism and the effects of globalization on your own life and the lives of people around the world.**

From the seventeenth to the early twentieth century, Western countries established colonies in numerous areas previously occupied by traditional societies. Although all these colonies have by now attained independence, the process of colonialism shaped the social map of the globe as we know it today. Scholars also have paid increasing attention to the harmful effects of colonialism, most notably the oppression and exploitation of Indigenous persons residing in colonized nations (McKay et al., 2020). In some regions, such as North America, Australia, and New Zealand, which were only thinly populated by hunting and gathering or pastoral communities, Europeans became the majority population. In North America, the native population was greatly reduced by the spread of European diseases, as well as through conquest (Diamond, 1999). This form of colonialism is sometimes referred to as *settler colonialism* because it took the form of large-scale European settlement (Veracini, 2010). In other areas, including much of Asia, Africa, and South America, the local populations remained in the majority and were governed by the colonial powers, largely for the benefit of the home country.

Societies created through settler colonialism, including the United States, have become industrialized. Those with large native populations ruled by colonial administrators experienced a much lower level of industrial development, largely because much of the wealth produced in these societies was co-opted by the colonial powers. These regions included South Asia, as well as much of Africa and Latin America. Colonialism came to an end by the mid-twentieth century, and today, many of these societies are experiencing rapid economic growth. Some, such as India and Brazil, are currently major drivers of global economic growth (Nederveen Pieterse, 2011).

There is no agreed-upon way of classifying countries in terms of their degree of industrialization. While it was once common to distinguish between "developed" and "developing" countries, it is not surprising that members of the latter category objected to being characterized as "developing," on the grounds that this classification privileged the "developed" countries of the world as being somehow more advanced. They saw this as both an invidious cultural judgment and an ignorance of the role of colonialism in shaping their adverse economic situations. Among sociologists, a commonly used distinction is between the "Global North" and the "Global South," since most (but not all) of what was once referred to as the industrialized world is found in the Northern Hemisphere, while most (but not all) of what was called the developing world lies in the Southern Hemisphere.

These different ways of characterizing the world today highlight the importance of language and reflect an increased sensitivity, at least among scholars of globalization, to the ways in which words can shape our perceptions, unconsciously elevating some societies to a more "advanced" status, while unconsciously denigrating others. We shall use the terms *Global North* and *Global South*, imperfect as they are, because they are least likely to imply a judgment about which is culturally preferable.

It is important to recognize that power relations are culturally embedded. The French sociologist Pierre Bourdieu (1986) introduced the concept of cultural capital, the accumulated cultural knowledge within a society that confers power and status (Barker, 2004). In Bourdieu's formulation, there are three kinds of cultural capital, each of which is strongly influenced by one's socioeconomic position in society: the first is what one embodies in one's very person (for example, one's way of dressing and speaking, and one's mannerisms); the next is reflected in the material objects one possesses (such as one's home, car, or computer); and the last is socially determined by larger institutions (such as the academic credentials required for a particular job). In the United States, for example, a person can be said to possess a great deal of cultural capital if they are articulate and persuasive in English language skills; have access to high-end computers and the software required to run complex business programs; and possess the advanced degrees necessary for a highly paid job with an investment firm.

Although there are always exceptions, those who possess the cultural capital valued in any society enjoy clear advantages over those who do not.

Since cultural capital reflects socioeconomic status, it can reinforce existing patterns of economic and political inequality.

# The Global South

As previously mentioned, the majority of countries in the Global South—South Asia, Africa, and South America—are in areas that underwent colonial rule. A few colonized areas gained independence early, such as Haiti, which became the first autonomous Black republic in 1804. The Spanish colonies in South America acquired their freedom in 1810, while Brazil broke away from Portuguese rule in 1822.

Some countries that were never ruled from Europe were nonetheless strongly influenced by colonial relationships. China, for example, was compelled from the seventeenth century on to enter into trading agreements with European powers, which assumed government control over certain areas, including major seaports. Hong Kong was the last of these. Most nations in the Global South have become independent states only since World War II, often following bloody anticolonial struggles. Examples include India, which shortly after achieving self-rule split into India and Pakistan; a range of other Asian countries (such as Malaysia, Myanmar, and Singapore); and countries in Africa (such as Algeria, the Democratic Republic of Congo, Kenya, Nigeria, and Tanzania).

Although they may include peoples living in traditional fashion, these countries differ from earlier forms of traditional society. Their political systems, following Western models, make them nation-states. Although most of the population still lives in rural areas, a rapid process of city development is occurring. Although agriculture remains the main economic activity, many crops are produced for sale in world markets. These countries are not merely societies that have somehow “lagged behind” the more industrialized areas; they emerged from contact with Western industrialism, which has undermined the more traditional systems.

The World Bank (2022d) estimates that 648 million people, or about 8 percent of the world’s population, are living in extreme poverty, which is defined as subsisting on $2.15 or less per day. Furthermore, the United Nations Food and Agriculture Organization (UN FAO) and other groups (2022) also estimate that as of 2021, 828 million people worldwide experienced hunger, and upwards of 2.3 billion people experienced food

insecurity. Almost all of these people live in the Global South and half live in sub-Saharan Africa. A third of the world's poor and hungry live in South Asia, in countries such as India, Pakistan, Indonesia, and Bangladesh (UN FAO et al., 2022). China, however, has made great strides; some 850 million people were lifted out of poverty between 1990 and 2019 (World Bank & the Development Research Center of the State Council, the People's Republic of China, 2022). A substantial number of the poor—some 201 million people—live on the doorstep of the United States, in the Caribbean and Central and South America (UN Economic Commission for Latin America and the Caribbean, 2022). Despite progress toward achieving the UN's Sustainable Development Goals, which call for ending poverty by 2030, major challenges remain, particularly in South Asia and sub-Saharan Africa, where most of the world's poor live. The global economic crisis in 2008 had an acutely destructive impact on people living in poverty, particularly women (UN Economic and Social Commission for Asia and the Pacific, 2010). Most of the gains in reducing global poverty and hunger have resulted from economic growth in China and East Asia.

Global poverty shouldn't be seen as remote from the concerns of Americans. Whereas in previous generations, the bulk of immigrants to the United States came from European countries, recent years have seen waves of Hispanic immigrants, nearly all from Latin America. Some U.S. cities, such as Los Angeles and Miami, have become international gateways to Latin America and are bursting with new immigrants who maintain trading connections with their home countries.

In most societies, poverty is worst in rural areas. Malnutrition, lack of education, low life expectancy, and substandard housing are most severe in the countryside, especially where arable land is scarce, agricultural productivity low, and drought or floods common. Women are usually more disadvantaged than men. For instance, they often work longer hours and, when paid at all, earn lower wages. (See Chapter 10 for a lengthier discussion of gender inequality.)

Women wait in line for food in Calcutta, India. Why does poverty disproportionately affect women around the world?

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The poor in the Global South live in conditions almost unimaginable to North Americans. Many have no permanent dwellings apart from shelters made of cartons or loose pieces of wood. Most have no running water, sewage systems, or electricity. Nonetheless, millions of poor people also live in the United States, and there are connections between poverty in America and global poverty. This is true of the descendants of the Black slaves brought over by force centuries ago, and it is true of more recent, and willing, immigrants who have arrived from Latin America, Asia, and elsewhere. Although immigrants and their children make up only 24.2 percent of the U.S. population, they account for a quarter of all those living in poverty in the United States (Camarota & Zeigler, 2022).

Some formerly impoverished countries have successfully embarked on a process of industrialization. Referred to as the emerging economies, they include Argentina, Brazil, Chile, China, India, Mexico, Singapore, South Korea, and Taiwan. The rates of economic growth of the most successful countries, such as those in East Asia, are several times those of the Western industrial economies.

The East Asian emerging economies are investing abroad as well as promoting growth at home. China is investing in mines and factories in

Africa, elsewhere in East Asia, and in Latin America. South Korea's production of steel has increased by nearly 50 percent between roughly the years of 2003 and 2013, and its shipbuilding and electronics industries are among the world's leaders (World Steel Association, 2013). Singapore is becoming the major financial and commercial center of Southeast Asia. Taiwan is an important presence in the manufacturing and electronics industries. All these changes have directly affected the United States. In fact, the "rise of the rest" (Zakaria, 2009) is arguably the most important aspect of global economic change in the world today.

It is worth noting that a country's economic growth does not necessarily mean that its citizens are happier or feel more secure. A growing body of research suggests the opposite: As countries industrialize, their people's general sense of well-being does not increase and may even decline. Even in China, despite unprecedented rates of economic growth that have elevated hundreds of millions of Chinese into middle-class status, the most recent research suggests that people's happiness—at least as measured on a "life satisfaction" index—is actually lower than it was two decades ago, before China's "growth miracle" took off (Easterlin, 2001, 2003, 2010; Easterlin & Sawangfa, 2010; Easterlin et al., 2010, 2012; Inglehart, 1997).

# Contemporary Industrial Societies: Cultural Conformity or Diversity?

The study of cultural differences highlights the influence of cultural learning on behavior, which can vary widely from culture to culture. For example, in the United States, we eat oysters but not kittens or puppies, both of which are regarded as delicacies in some parts of the world. Westerners regard kissing as a normal part of sexual behavior, but in other cultures, the practice is either unknown or regarded as disgusting.

## Cultural Conformity

All cultures serve as an important source of conformity. For example, when you say that you subscribe to a particular value, you are probably voicing the beliefs of your family members, friends, teachers, or others who are significant in your life. When you choose a word to describe some personal experience, that word acquires its meaning in a language you learned from others.

American high school and college students often see themselves as especially nonconformist. Like the hipsters of the millennial generation, the hippies of the 1960s and the punks of the 1980s all sported distinctive clothing styles, haircuts, and other forms of bodily adornment. Yet how individualistic were they? Were their styles actually “uniforms,” just as navy blue suits or basic black are “uniforms” among conservative businesspeople?

There is, in fact, an aspect of conformity to their behavior—conformity to their own group. When you buy a seemingly unique article of clothing to express your individuality, that garment was likely created by the design department of a global manufacturer that studied the current tastes of consumers and then ordered the mass production of your “unique” garment. When you listen to music, it is most likely the same kind that your friends listen to.

One of the challenges for all cultures is to instill in people a willingness to conform. Encouraging conformity is accomplished in two ways (Parsons, 1951/1964). First, members learn the norms of their culture starting from childhood, with parents playing a key role. When learning is successful, the ingrained norms become unquestioned ways of thinking and acting; they appear “normal.” (Note the similarity between the words *norm* and *normal*; they share a common root.) Second, social control comes into play when a person fails to conform adequately to a culture’s norms. Social control often involves informal punishment, such as rebuking friends for minor breaches of etiquette, gossiping behind their backs, or ostracizing them from the group. Formal forms of discipline might range from parking tickets to imprisonment (Foucault, 1975). Émile Durkheim argued that punishment not only helps guarantee conformity among those who would violate a culture’s norms and values but also vividly reminds others what the norms and values are.

Cultures differ, however, in how much they value conformity. Research shows that Chinese culture lies at one extreme in terms of valuing conformity (Hofstede, 1997; Minkov & Hofstede, 2012), while at the other extreme lies American culture, ranking among the world’s highest in cherishing individualism. Americans pride themselves on their independence of spirit, represented by the lone bald eagle, the U.S. national symbol. Globalization—from Starbucks and McDonald’s to the widespread use of the internet and smartphones—is exposing many young Chinese to more individualistic Western values.

On the left, members of a 1970s commune relax outdoors. On the right, punks hang out on a street corner in the 1980s. Though their distinctive styles set them apart from mainstream society, these people are not as nonconformist as they may think they are. Both subcultures pictured here conform to the norms of their respective social groups.

## Cultural Appropriation

Cultural appropriation occurs when members of one cultural group borrow elements of another's culture, such as when a person who is not an American Indian dons a feathered headdress on Halloween or when a non-Japanese person wears a kimono. Rock music became popular when White musicians—from Elvis Presley to the Rolling Stones—drew on African American blues and gospel, appropriating key musical elements that were then introduced to largely White audiences in Europe and the United States. While the history of music, art, and even language shows that cultural appropriation is widespread, sociologists have asked, When is it offensive to take on elements of a culture to which you don't belong? Sometimes even the most well-intentioned and seemingly benign decisions to borrow the cultural style of another group can be understood quite differently by those who come from that culture.

Sociologist George Lipsitz (1997) has argued that when a majority or dominant culture appropriates elements of a minority culture, particularly

one that has historically suffered oppression at the hands of the majority, it is especially important that those doing the appropriation be extremely sensitive to the historical meaning and contemporary significance of the cultural forms being appropriated. In October 2015, the campus of Yale University broke out in controversy over a series of emails written by administrators about Halloween. The uproar began when the college's Intercultural Affairs Committee sent an email advising students to avoid costumes that "threaten our sense of community or disrespect, alienate or ridicule segments of our population based on race, nationality, religious belief or gender expression." A few days later, a Yale instructor and wife of the deputy director of one of the college's dorms wrote a pointed response that questioned whether it was appropriate for college administrators to police the costumes of young adults. In an email to the dorm residents, she asked, "Is there no room anymore for a child or young person to be a little bit obnoxious, a little bit inappropriate or provocative, or yes, offensive?" This email set in motion a series of protests, with many students calling for her resignation. Many felt that she was dismissing the power of harmful stereotypes to further degrade marginalized groups. Ultimately, in early 2016, the instructor and her husband stepped down from their posts in residential life.

Although no hard-and-fast rules can resolve such conflicts, Lipsitz argues that we should always be aware of what is at stake: Sometimes cultural appropriation can reduce an entire way of life to demeaning stereotypes that exacerbate historically unequal power relations. For this reason, many schools have banned the use of Native American mascots.

## Cultural Diversity

Small societies tend to be culturally uniform, but industrialized societies involving numerous subcultures are themselves culturally diverse, or multicultural. As processes such as slavery, colonialism, war, migration, and contemporary globalization have led populations to settle in new areas, societies have emerged that are cultural composites: Their population comprises groups from diverse cultural and linguistic backgrounds. In modern cities, for example, many subcultural communities live side by side.

Subcultures not only imply different cultural backgrounds or different languages within a larger society, but include segments of the population that have different cultural patterns. Subcultures might include Goths,

cosplayers, hackers, hippies, and fans of hip-hop. Some people identify with a particular subculture, whereas others move among several.

Culture helps perpetuate the values and norms of a society, yet it also offers opportunities for creativity and change. Subcultures and countercultures—groups that reject prevailing values and norms—can promote views that represent alternatives to the dominant culture. Social movements or groups with common lifestyles are powerful forces of change within societies, allowing people to express and act on their opinions, hopes, and beliefs. For example, throughout most of the twentieth century, gays and lesbians formed a distinct counterculture in opposition to dominant cultural norms. In a few cities, such as San Francisco, New York, and Chicago, LGBTQ+ persons lived in distinct enclaves and even developed political power bases. Over time, their political claims and lifestyle became more and more acceptable to mainstream Americans, so much so that gay marriage was legalized nationwide in 2015. Today, queer Americans are no longer a counterculture. As the wider society has increasingly embraced their demand to be included in the institution of marriage, gays and lesbians have embraced one of the most significant institutions of mainstream society.

The origins of hip-hop culture can be traced back to DJ Kool Herc (left), who brought the Jamaican disc jockey tradition of "toasting' to New York in the mid-1970s. M.I.A. (right) represents one aspec of widening appeal of hip-hop across cultural lines.

U.S. schoolchildren are frequently taught that the United States is a vast melting pot that assimilates subcultures. Assimilation is the process by which different cultures are absorbed into a mainstream culture. Although virtually all peoples living in the United States take on some common cultural characteristics, many groups strive to retain a unique identity. In fact, identification based on race or country of origin persists in the United States, particularly among African Americans and immigrants from Asia and Latin America (Parekh, 2010). Research has found that migrants to the United States have gradually adopted the label of "American"; however, scholars still point to a segmented assimilation where certain groups have better opportunities by which to enter U.S. society (Sezgin, 2012).

A more appropriate metaphor for American society than the assimilationist melting pot might be the culturally diverse salad bowl in which all the

ingredients, though mixed together, retain their original flavor and integrity, thereby contributing to the richness of the salad as a whole. This viewpoint, termed multiculturalism, calls for respecting cultural diversity and promoting the equality of different cultures (Anzaldúa, 1990).

As we have seen, in many modern industrial nations, young people have their own subcultures. Youth subcultures typically revolve around musical preferences and distinctive styles of dress, language (especially slang), and behavior. Like all subcultures, however, they still accept most of the norms and values of the dominant culture.

Consider the patchwork that is hip-hop. Although it emerged in the mid-1970s as a subculture in the Bronx, New York, hip-hop owes much of its identity to Jamaica. The first important hip-hop DJ, Kool Herc, was a Jamaican immigrant, and rapping derives from the Jamaican DJ tradition of "toasting," chanting stories into microphones over records. The story of hip-hop is a lesson in the fluidity of contemporary cultural identity. The music is built around beats from other records, but in "sampling" from recordings, hip-hop artists often do something more significant: They sample identities, taking on the characteristics of subcultures that can be considerably foreign to them.

Hip-hop's reach has widened over time. Pioneering rappers and rap groups from Queens and Long Island—such as Run-DMC, LL Cool J, and Public Enemy—recorded some of the first great hip-hop albums. By the end of the 1980s, the music had a national presence in the United States, as L.A. artists such as N.W.A and Ice T developed gangsta rap, which soon had outposts in Oakland, New Orleans, Houston, and elsewhere. White rappers such as Kid Rock and Eminem, following in the footsteps of the Beastie Boys, pioneered a rap-rock synthesis, and a Filipino American crew known as the Invisibl Skratch Piklz revolutionized turntable techniques. Hip-hop soon became a global form. Mathangi "Maya" Arulpragasam, better known by her stage name M.I.A., is of Sri Lankan Tamil descent and used the cultural milieu of West London to help shape her specific style.

The sampled beats of hip-hop can contain nearly anything. The secret is transformation: A portion of an earlier song, recast to fit a new context, can take on an entirely different meaning while still retaining enough of its former essence to create a complicated and richly meaningful finished product. In many ways, hip-hop is a music of echoes—rappers revisiting the funk music and "blaxploitation" films of the 1970s (Black action movies often criticized for glorifying violence and presenting Blacks in

negative stereotypes); suburban fans romanticizing inner-city street styles. Hip-hop is the soundtrack to an emerging global culture that treats the looks, sounds, and byways of particular subcultures, or particular moments in time, as raw material for the creation of new styles.

What does hip-hop tell us about cultural diversity? On the one hand, its history of incorporating an ever-wider circle of influences and participants demonstrates that what is “normal” in one community can quickly be adopted in another community far away, through dissemination via vinyl records, digital samples, and other media. On the other hand, the controversies that hip-hop has generated suggest that such cultural crossings also bring uncertainty, misperception, and fear. Finally, hip-hop’s evolution suggests that even in a global culture, subcultural distinctions retain an important aura of authenticity. Even today, hip-hop describes aspects of social realities that most Americans would prefer not to contemplate.

Subcultures also develop around types of work associated with unique cultural features. Long-distance truckers, coal miners, Wall Street stockbrokers, computer programmers, professional athletes, corporate lawyers, and artists, for example, form subcultures that value (respectively) physical strength, bravery, shrewdness, knowledge, speed, material wealth, and creativity. However, they seldom stray far from the dominant culture. Even professional thieves share most of the values of U.S. society: They marry and raise children; like most Americans, they want to accumulate wealth, power, and prestige; they eat with knives and forks, drive on the right side of the road, and try to avoid trouble as much as possible (Chambliss, 1988).

**Table 3.2 APPLYING SOCIOLOGY TO CULTURE**

| **CONCEPT** | **APPROACH TO CULTURE** | **CONTEMPORARY APPLICATION** |
|---|---|---|
| **Cultural Appropriation** | The adoption of one cultural group’s elements by another cultural group. | A non-Native American wearing a feathered headdress on Halloween. |

| CONCEPT | APPROACH TO CULTURE | CONTEMPORARY APPLICATION |
|---|---|---|
| **Subcultures** | Values and norms held by a group within a wider society that are distinct from those of the majority | Young people whose cultural patterns and identities develop from and around skateboarding, video games, or certain types of music. |
| **Countercultures** | Groups that reject mainstream norms and values and thus question the status quo | The anti-vaccine movement. |
| **Assimilation** | The process by which the cultures of minority populations are absorbed into mainstream culture. | The increasing use of white wedding dresses by immigrants from countries where this is not a cultural norm. |
| **Multiculturalism** | A condition in which ethnic groups exist separately and share equally in economic and political life. | Changes in college curricula that place greater emphasis on the culture and contributions of non-Western societies. |

## Cultural Identity and Ethnocentrism

Every culture displays unique patterns of behavior. If you have traveled abroad, you know that aspects of daily life taken for granted in your own culture may not be part of everyday life elsewhere. Even in countries that share the same language, you might find customs to be quite different. The expression *culture shock* is an apt one. Often people feel disoriented when immersed in a new culture because they have lost familiar cultural reference points and have not yet learned how to navigate in the new culture.

Almost any familiar activity will seem strange if described out of context. Western cleanliness rituals are no more or less bizarre than the customs of some Pacific groups who knock out their front teeth to beautify themselves or of certain South American tribal groups who place disks inside their lips to make them protrude, believing that this enhances their attractiveness. We cannot understand these practices and beliefs separately from the wider cultures of which they are a part. A culture must be studied in terms of its own meanings and values—a key presupposition of sociology. Sociologists seek to avoid ethnocentrism, which is the judging of other cultures in terms of the standards of one's own. We must remove our own cultural blinders to see the ways of life of different peoples in an unbiased light. The practice of judging a society by its own standards is called cultural relativism.

Applying cultural relativism can be fraught with uncertainty and challenge. Not only is it hard to see things from a completely different point of view, but sometimes troubling questions arise. Does cultural relativism mean that all customs and behaviors are equally legitimate? Are there any universal standards to which all humans should adhere? Consider the ritual of female genital cutting, or what opponents have called "genital mutilation." This is a painful cultural ritual, practiced in certain African, Asian, and Middle Eastern societies, in which the clitoris and sometimes all or part of the vaginal labia are removed with a knife or a sharpened stone and the two sides of the vulva are partly sewn together as a means of controlling sexual activity and increasing the sexual pleasure of the man. The World Health Organization (2023) estimates that more than 200 million girls and women today have undergone female genital cutting.

In cultures where female genital cutting has been practiced for generations, it is regarded as normal. A study of 2,000 men and women in two Nigerian

communities found that 9 out of 10 women interviewed had undergone clitoridectomies, a form of genital cutting, in childhood; the large majority favored the procedure for their own daughters, primarily for cultural reasons. However, a significant minority believed that the practice should be stopped (Ebomoyi, 1987). Female genital cutting is regarded with abhorrence by most people from other cultures and by a growing number of women in the cultures where it is practiced (el Dareer, 1982; Johnson-Odim, 1991; Lightfoot-Klein, 1989). These differences in views can result in a clash of cultural values, especially when people from cultures where female genital cutting is common migrate to countries where the practice is illegal.

In France, for instance, a country with a large North African immigrant population, many African mothers arrange for traditional clitoridectomies to be performed on their daughters. Some have been tried and convicted under French law for mutilating their children, but these African mothers have argued that they were engaging in the same cultural practice that their own mothers had performed on them, that their grandmothers had performed on their mothers, and so on. They have complained that the French are ethnocentric, judging traditional African rituals by French customs. Feminists from Africa and the Middle East, while themselves strongly opposed to female genital cutting, have criticized Europeans and Americans who sensationalize the practice by calling it "backward" or "primitive" without seeking any understanding of the underlying cultural and economic circumstances (Wade, 2012; Knop et al., 2012). In this instance, globalization has led to a clash of cultural norms and values that has forced members of both cultures to confront some of their most deeply held beliefs. The role of the sociologist is to avoid knee-jerk responses and to examine complex questions carefully and from as many angles as possible.

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**CONCEPT CHECKS**

1. **Give examples of subcultures that are typical of American society.**
2. **Why is cultural appropriation considered problematic by some?**
3. **What is the difference between cultural ethnocentrism and cultural relativism?**

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# Glossary

colonialism
: The process whereby Western nations established their rule in parts of the world away from their home territories.

cultural capital
: The accumulated cultural knowledge within a society that confers power and status.

emerging economies
: Countries located primarily in the Global South, such as India and Singapore, that over the past three to four decades have begun to develop a strong industrial base.

cultural appropriation
: The adoption of one cultural group's elements by another cultural group.

subcultures
: Values and norms held by a group within a wider society that are distinct from those of the majority.

countercultures
: Cultural groups within a wider society that largely reject the values and norms of the majority.

assimilation
: The process by which different cultures are absorbed into a mainstream culture.

multiculturalism
: A condition in which ethnic groups exist separately and share equally in economic and political life.

ethnocentrism
: The tendency to look at other cultures through the eyes of one's own culture, and thereby misrepresent them.

cultural relativism
: The practice of judging a society by its own standards.

# 4 UNANSWERED QUESTIONS

**Understand the debate over the influence of biological and cultural factors on behavior. Learn how the internet and global culture influence local cultures.**

We face many unanswered questions in the sociological study of culture and society. One of the oldest debates concerns whether we are more likely to be shaped by biological factors or social ones. More recently, many debates have focused on the role of the internet, and on globalization more generally, in shaping the modern world. We now turn to some of these unanswered questions.

## Does Nature or Nurture More Powerfully Influence Human Behavior?

Because humans evolved as part of the world of nature, one would assume that human thinking and behavior are the result of biology and evolution. In fact, one of the oldest (and still unresolved) controversies in the social sciences is the "nature/nurture" debate: Are we shaped by our biology, or are we products of learning through life's experiences—that is, of nurture? Whereas biologists and some psychologists emphasize biological factors, sociologists stress the role of learning and culture. They also argue that because human beings can make conscious choices, neither biology nor culture wholly determines human behavior.

The nature/nurture debate has raged for more than a century. For example, in the 1930s and 1940s, many social scientists focused on biological factors, with some seeking (unsuccessfully) to prove that a person's physique determined their personality. In the 1960s and 1970s, scholars in different fields emphasized culture. Some social psychologists argued that even severe mental illness was the result of society labeling some behavior as unusual rather than the consequence of biochemical processes (Scheff, 1966). Today, partly because of new understandings in genetics and brain neurophysiology, the pendulum is again swinging toward the side of biology.

The resurgence of biological explanations for human behavior began in 1975, when the evolutionary biologist Edward O. Wilson published *Sociobiology: The New Synthesis.* The term sociobiology refers to the application of biological principles to explain the social activities of animals, including human beings. Wilson argued that genes influence not only physical traits but also behavior. For instance, some species of animals perform elaborate courtship rituals leading to sexual union and reproduction. Human courtship and sexual behavior, according to sociobiologists, involve similar rituals. Also, in most species, males are larger and more aggressive than females. Some suggest that genetic factors explain why, in all known human societies, men tend to hold positions of greater authority than women.

Sociologists argue that our preferences for particular body types are not biologically ingrained but rather shaped by cultural norms of beauty communicated through magazine ads, commercials, and movies.

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One way in which sociobiologists illuminate the relations between the sexes is through the idea of *reproductive strategy*, a pattern of behavior developed through evolutionary selection that favors the chances of survival of offspring. The female body has a larger investment in its reproductive cells than the male—a fertilized human egg takes nine months to develop. Thus, women will not squander that investment and are not driven to have sexual relations with many partners; their overriding aim is the care and protection of children. Men, on the other hand, desire to have sex with many partners, which is a sound strategy in terms of preserving the species. This view, it has been suggested, explains differences in sexual behavior and attitudes between men and women.

Sociobiologists do not argue that genes determine 100 percent of our behavior. For example, depending on the circumstances, men can choose to act in nonaggressive ways. Yet, even though this argument seems to add culture as another explanatory factor in describing human behavior, social scientists have condemned sociobiology for claiming that a propensity for particular behaviors, such as violence, is somehow "genetically programmed" (Seville Statement on Violence, 1990).

Different biological factors interact with, and respond to, environmental inputs. It has been difficult to find compelling, substantive data on the interaction between biology and experience. But more evidence is coming out of studies of brain development. Beginning in the womb, genes interact with hormones to shape the child's development (Stiles, 2011).

Most sociologists today acknowledge a role for nature in determining attitudes and behavior, but with strong qualifications. For example, no one questions that newborn babies have basic human reflexes, such as "rooting" for the mother's nipple and responding to the human face (Cosmides & Tooby, 1997; Johnson & Morton, 1991). But it is a leap to conclude that because babies have human reflexes, adult behavior is governed by instincts—biologically fixed patterns of action found in all cultures.

Sociologists now ask how nature and nurture interact to produce human behavior. They acknowledge that all known human cultures have some common characteristics—for example, language, forms of emotional expression, rules for raising children or engaging in sexual behavior, and standards of beauty (Brown, 1991). But they also recognize that there is enormous variety in *how* these common characteristics play out: It is not some biological disposition that makes American men feel attracted to a *particular* type of woman. Rather, it's their exposure to magazine ads, TV commercials, and movies that transmit culturally specific standards of female beauty.

Because humans think and act in many different ways, sociologists do not believe that "biology is destiny." If biology were all-important, we would expect all cultures to be similar, if not identical. Yet this is hardly the case. For example, pork is forbidden to religious Jews and Muslims, but it is a dietary staple in China. All cultures have standards of beauty and ornamentation, but what constitutes beauty in one culture may

constitute the opposite in another (Elias, 1987; Elias & Dunning, 1987; Foucault, 1988). However, some feminist scholars have argued that with global access to Western images of beauty on the internet, cultural definitions of beauty throughout the world are growing narrower and increasingly emphasize the slender physique that is so cherished in many Western cultures (Sepúlveda & Calado, 2012).

In 2008, a special issue of the *American Journal of Sociology* was dedicated to the nature/nurture debate, specifically the relationship between genetics and social influences on human behavior (Bearman, 2008). The studies generally concluded that while genetics are important, how genes might affect behavior depends largely on the social context. For example, a study of obesity among adolescents found that social and behavioral factors, such as a family's lifestyle (for example, how much time a family spends watching TV or how often a family skips meals), have a significant effect on the likelihood that children will end up overweight, even when both parents are heavy (Martin, 2008). Similarly, an international study of gender differences in mathematical ability found that such differences varied widely across countries, with differences in high mathematical performance between men and women reflecting the country's level of gender inequality rather than purely biological factors (Penner, 2008). Even alcoholism is strongly affected by social context: While a specific gene has been identified as increasing one's propensity for alcohol dependence, a strong family support system can greatly reduce that risk (Pescosolido et al., 2008).

Sociologists' main concern, therefore, is with how behavior is learned through interactions with family, friends, schools, television, and every other facet of the social environment. Early child-rearing is especially relevant to this kind of learning. Human babies have a large brain, requiring birth relatively early in their fetal development, while their heads can still pass through the birth canal. As a result, human babies must spend a number of years in the care of adults, during which time children learn their society's culture. All cultures therefore provide for childhood socialization, but the processes vary greatly from culture to culture. An American child learns the multiplication table from a classroom teacher, whereas a child in the forests of Borneo learns to hunt with older members of the tribe.

Perhaps recent scientific advances in brain neurophysiology and genetics will tip the balance more toward emphasizing the role of nature in

shaping human behavior. But for the present, most sociologists would conclude that both nature and nurture interact in complex and as yet imperfectly understood ways to shape who we are and how we behave.

# Does the Internet Promote a Global Culture?

Many believe that the rapid worldwide growth of the internet is hastening the spread of a global culture resembling the cultures of Europe and North America. Belief in such values as equality between men and women, the right to speak freely, democratic participation in government, and the pursuit of pleasure through consumption are diffused throughout the world over the internet. Moreover, internet technology itself seems to foster such values: Global communication, seemingly unlimited (and uncensored) information, and instant gratification all characterize the new technology.

Yet it may be premature to conclude that the internet will sweep aside traditional cultures. Cyberspace is becoming increasingly global, and evidence shows that the internet is, in many ways, compatible with traditional cultural values, perhaps even a means of strengthening them. This is especially likely to be true in countries that seek to control the internet, censoring or blocking unwanted content and punishing those whose postings violate traditional values. One example is Saudi Arabia, a monarchy that officially enforces a highly conservative form of traditional Islam. The Saudi government not only routinely filters or blocks internet content but also uses it to disseminate official propaganda. Content deemed “harmful, “anti-Islamic,” or “offensive” is blocked, including any criticism of the royal family, and messaging apps such as Telegram and WhatsApp are restricted. In order to sell its iPhone in the kingdom, Apple had to remove the device’s built-in FaceTime app. Social media is heavily monitored, and cyber-dissidents—for example, those who defend women’s or minority rights or criticize traditional religious beliefs—are likely to receive steep fines and severe punishment. In 2016, a Saudi individual was sentenced to 10 years in prison and 2,000 lashes for “spreading atheism” on Twitter (Freedom House, 2016).

Yet at the same time, even under such repressive conditions, the internet provides a space for self-expression and discussion, albeit within limits.

Saudis are some of the most active social media users in the world and are the largest adopters of Twitter in the Arab world. Women, for example, who constitute more than half of all internet users in Saudi Arabia, are able to engage in internet discussions that would be forbidden in public, such as those about women's health issues.

The internet has sometimes been described as an echo chamber, in which people seek out like-minded others whose postings reinforce their own beliefs (Manjoo, 2008; Sunstein, 2012). For example, one study of a Jewish ultraorthodox religious group found that the internet helped strengthen the community, providing a forum for communication and the sharing of ideas (Barzilai-Nahon & Barzilai, 2005). In this sense, the internet may be splitting society into what can be thought of as digitally linked tribes with their own unique cultural beliefs and values—sometimes even in conflict with the dominant culture. Examples from youth subcultures in recent years would include hippies, punks, skinheads, Rastas, Goths, gamers, rappers, and dancehall enthusiasts. Such subcultures sometimes emerge when ethnic minority youth seek to create a unique cultural identity within the dominant culture, often through music, dress, hairstyle, and bodily adornment such as tattoos and piercing. They are often hybrids of existing cultures: For example, dancehall, like reggae, which originated as part of a youth culture in Jamaica's poor neighborhoods, today has spread to the United States, Europe, and anywhere there has been a large Caribbean migration (Niahh, 2010).

According to Freedom House, two-thirds of internet users live in countries where criticism of the government is subject to censorship. In addition to censoring Facebook and Twitter, governments are increasingly targeting messaging apps like WhatsApp and Telegram.

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Finally, of course, the internet can be used to build a community around ideas that directly threaten the dominant culture. Al Qaeda, ISIS, and other radical Islamist jihadists rely on the internet to spread their ideas, attract new recruits, and organize acts of violence. Suicide bombers routinely make videos celebrating their imminent deaths, videos that are posted on jihadist websites (and occasionally even YouTube) to reach a wider audience of current and potential believers. Extremist groups from all faiths (including Christian, Jewish, Muslim) have found the internet to be a useful tool (Juergensmeyer, 2008).

# Does Globalization Weaken or Strengthen Local Cultures?

The world has become a single social system as a result of growing ties of interdependence, both social and economic, that affect everyone. But it would be a mistake to think of increasing globalization simply as the growth of world unity. Rather, it is primarily the reordering of time and distance in social life as our lives are increasingly influenced by events far removed from our everyday activities.

Globalizing processes have brought many benefits to Americans, such as a much greater variety of goods and foodstuffs. At the same time, those processes have helped create some of the most serious problems American society faces, such as global climate change, the threat of terrorism, and the loss of jobs to low-wage workers in other countries.

The growing global culture has provoked numerous reactions at the local level. Many local cultures remain strong or are experiencing rejuvenation, partly out of the concern that a global culture, dominated by North American and European cultural values, will corrupt the local culture. For example, extremist Islamist movements in Afghanistan, in the tribal areas of Pakistan, in Yemen, and elsewhere in the Middle East seek to impose traditional tribal values, often prohibiting the

consumption of alcohol, requiring men to grow full beards, and forbidding women from working outside their homes or being seen in public with men who are not their spouses or relatives. In some cases, violations of these rules are punished, sometimes by death. These movements can be understood partly as a rejection of the spread of Western culture—what Osama bin Laden referred to as “Westoxification” (Juergensmeyer, 2001).

The resurgence of local cultures is evident in the rise of nationalism, a sense of identification with one’s people expressed through a common set of strongly held beliefs. Nationalism can be highly political, involving attempts to assert the power of a nation based on a shared ethnic or racial identity over people of a different ethnicity or race. The strife in the former Yugoslavia, and in parts of Africa and the former Soviet Union, bear tragic witness to the power of nationalism. The world of the twenty-first century may well witness responses to globalization that celebrate ethnocentric nationalist beliefs, promoting intolerance and hatred rather than acceptance of diversity.

New nationalisms, cultural identities, and religious practices are constantly being forged throughout the world. When you socialize with students from the same cultural background or celebrate traditional holidays with friends and family, you are sustaining your culture. The very technology that helps foster globalization also supports local cultures: The internet enables you to communicate with others who share your cultural identity, even when they are dispersed around the world. A casual search of the web reveals thousands of pages devoted to different cultures and subcultures.

Although sociologists do not fully understand these processes, they often conclude that despite the powerful forces of globalization, local cultures remain strong. But it is too soon to tell whether and how globalization will result in the homogenization of the world’s cultures, the flourishing of many individual cultures, or both.

# How Easily Do Cultures Change?

In 1922, one of sociology’s early founders, William F. Ogburn, introduced the notion of cultural lag—the idea that cultural changes take

time to catch up with changes in technology, resulting in challenges for societies undergoing rapid transformation (Ogburn, 1964). In the modern world, changes in material culture precede changes in nonmaterial culture, often resulting in a host of social problems. For example, recent advances in synthetic biology, such as gene editing, have made it relatively easy (and inexpensive) to alter specific genes, opening up the possibility of creating new life forms with unique (and presumably desirable) properties.

One experiment, currently under serious consideration, involves altering the genes in thousands of white-footed mice on Nantucket Island, rendering them resistant to Lyme disease. Once altered, the mice would spread the gene to the offspring of the roughly 1 million mice on the island, eventually eradicating a disease that afflicts many of the island's residents. Gene editing could also be used to create a strain of malaria-resistant mosquitoes, thereby eliminating an illness that kills hundreds of thousands of children every year. It might even be used, in the perhaps not-so-distant future, to design human offspring—children who excel as students, athletes, or musicians (Specter, 2017; Ledford, 2016)!

Gene-editing techniques may hold great promise, but "rewriting the code of life" (as it has been described) raises a host of ethical questions. Apart from the possibility of disastrous unintended consequences, such as the creation of new Frankenstein-like species that bring unknown dangers, gene editing is seen by some as playing God, a violation of widely shared values (McFadden, 2016). Such concerns have led the U.S. National Academy of Sciences and National Academy of Medicine to develop guidelines for modifying human genes (Reardon, 2015). Scientific knowledge has, in this case, greatly outstripped long-standing values, which may well slow the adoption of this new technology.

China, which has undergone a transformation in recent years that is in many ways historically unprecedented, provides another illustration of cultural lag. Thirty years ago, China was completely closed to foreign businesses. Government bureaucrats, who controlled every economic institution, ran its economy. From large factories to small businesses to collective farms—all were owned and run by the state. The Chinese government also sought to control most aspects of Chinese culture: Media were state run, education was tightly managed to promote values that the ruling Communist Party deemed appropriate, and any signs of disagreement were closely monitored and often punished. Wall posters

would denounce behavior that deviated from acceptable norms, while many universities and public places had loudspeaker systems that would frequently broadcast inspirational messages or criticize bad behavior.

Today, China appears to be a vastly different place, especially in the more developed coastal regions and large metropolitan areas. While some key industries remain state owned, most of the economy is now in private hands. European, American, Japanese, and other foreign firms are flocking to China in large numbers, bringing with them the cultural values of their home countries. China's rapidly growing economy has lifted hundreds of millions of people into middle-class status, turning them into consumers not only of products but also of information. China now claims more than 1.6 billion cell phone users (Slotta, 2022), opening up many Chinese to foreign sources of information and culture. Although the Chinese government still censors search engines, websites, blogs, and Twitter feeds it deems critical of central government policies, a great deal of dissent is now tolerated. Importantly, many Chinese are now exposed to cultural norms and values that 30 years ago were considered unthinkable.

Have these changes significantly altered Chinese culture so that it is becoming more Western? While superficially this may seem to be the case, in some ways, traditional Chinese culture has remained remarkably durable. Take one example: the failure to instill in China's leading scientists and engineers a strong cultural value for the kinds of innovative thinking that can lead to technological breakthroughs. In the United States, such thinking is highly culturally valued. One result in the business world has been the creation of such innovative brands as Apple, Facebook, and Twitter. Such brands often achieve worldwide cachet—so much so that after the iPhones 6 and 6 Plus were introduced in October 2014, Apple was forced to divert stock from India to better meet the demand in China, which is one of its fastest-growing markets (Mukherjee, 2014; Chen, 2014).

Chinese students exit Maotangchang School at 11 P.M. after a 16-hour day of studying for the *gaokao*, the country's college entrance exam.

To date, China's economic growth has been based largely on manufacturing and assembling products for foreign firms, rather than innovating new brands that capture global markets. Chinese scientists and engineers are known for their strong work ethic—for putting in long hours at diligent labor in their effort to innovate. Yet, thus far, the results have been mainly improving on foreign designs, rather than developing truly unique Chinese breakthroughs. During the past decade, the Chinese government has sought to change this situation. It has invested vast sums of money in higher education and science parks in the hope of spurring technological breakthroughs that will result in Chinese brand-name products that consumers the world over will want to buy. But, so far, these efforts have not succeeded. Why haven't they?

There are many reasons, but one has to do with a long-standing cultural tradition emphasizing the importance of memorization and rote learning, which produces stunning results on standardized tests but discourages the kind of "outside-the-box," more analytical thinking that can contribute to truly innovative breakthroughs (Wilsdon & Keeley, 2007). The Chinese cultural value that emphasizes test-taking as the key measure of one's ability dates back to the sixth and seventh centuries, when entrance into prestigious government jobs was first based on passing a difficult

examination (Miyazaki, 1981). Every year, millions of Chinese students now take the dreaded two- to three-day exam known as the *gaokao*, which determines not only whether they will go to college, but also what college they will go to, and, ultimately, their life prospects. Hopeful parents often hire expensive private tutors, and students spend months (if not years) in preparation (Sudworth, 2012).

As a result, Chinese students do extraordinarily well when tested. In 2012, on a standardized test administered to over half a million 15-year-olds in 65 countries, Chinese students scored higher than students from any other country on science, reading, and math. U.S. students, by way of comparison, ranked 20th in science, 17th in reading, and 27th in math (Organisation for Economic Co-operation and Development, 2014). Yet despite their superior performance, Chinese students do not often come up with creative, breakthrough ideas after they graduate, whether in the laboratory or in business (Parker & Appelbaum, 2012).

In an effort to change this situation, the Chinese government recently instituted an educational reform plan calling for more flexible college admissions policies modeled, in part, on the U.S. approach; letters of recommendation and extracurricular activities are now supposed to be considered (*Chronicle of Higher Education*, 2010; Wang 2010). There is little evidence, however, that such official edicts have had any effect on students' relentless preparation for the *gaokao* or on college admissions committees' decisions.

Cultural beliefs and practices that have been in existence for nearly 1,500 years do not change easily.

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**CONCEPT CHECKS**

1. **Explain the nature/nurture debate. How is recent sociological research on the relationship between genetics and social influences on human behavior contributing to this debate?**
2. **How is the internet affecting local cultures?**
3. **What is "cultural lag"? Think of a time when U.S. society has grappled with the implications of a new technology.**

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# Glossary

sociobiology
: An approach that attempts to explain the behavior of both animals and human beings in terms of biological principles.

instincts
: Fixed patterns of behavior that have genetic origins and that appear in all normal animals within a given species.

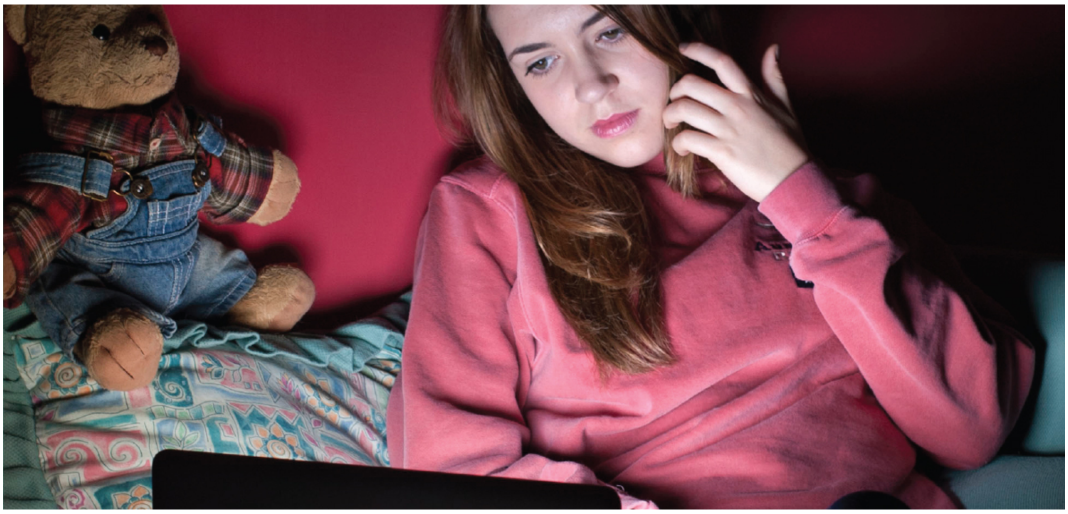
nationalism
: A set of beliefs and symbols expressing identification with a national community.

cultural lag
: The idea, introduced by William Ogburn, that changes in cultural values and norms take time to catch up with technological developments.

# THE BIG PICTURE

# Chapter 3

## Culture and Society



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**Exercises:** Thinking Sociologically

1. Mention at least two cultural traits that you would claim are universals; mention two others you would claim are culturally specific traits. Use case study materials from different societies to show the differences between universal and specific cultural traits. Are the cultural universals you have discussed derivatives of human instincts? Explain your answer.
2. What does it mean to be ethnocentric? How is ethnocentrism dangerous in conducting social research? How is ethnocentrism problematic among nonresearchers in their everyday lives?

# BASIC CONCEPTS p. 62

## Learning Objectives

Know what culture consists of and recognize how it differs from society.

## Terms to Know

culture • society • cultural universals • marriage • nonmaterial culture • material culture • values • norms • symbol • signifier • semiotics • language • linguistic relativity hypothesis

## Concept Checks

1. Describe the main elements of culture.
2. What role does culture play in society?
3. Identify three examples of cultural universals.
4. What is the linguistic relativity hypothesis?

# THE SOCIOLOGICAL STUDY OF CULTURE p. 69

## Learning Objectives

Learn about the "cultural turn" and sociological perspectives on culture. Understand the processes that changed societies over time.

## Terms to Know

cultural turn • hunting and gathering societies • pastoral societies • agrarian societies • industrialization • industrialized societies • nation-states

## Concept Checks

1. Compare the three main types of premodern societies.
2. What transformations led to the development of civilizations?
3. What does the concept of industrialization mean?
4. How has industrialization weakened traditional social systems?

# RESEARCH TODAY: UNDERSTANDING THE MODERN

# WORLD p. 76

## Learning Objectives

Recognize the legacies of colonialism and the effects of globalization on your own life and the lives of people around the world.

## Terms to Know

colonialism • cultural capital • emerging economies • cultural appropriation • subcultures • countercultures • assimilation • multiculturalism • ethnocentrism • cultural relativism

## Concept Checks

1. Give examples of subcultures that are typical of American society.
2. Why is cultural appropriation considered problematic by some?
3. What is the difference between cultural ethnocentrism and cultural relativism?

# UNANSWERED QUESTIONS p. 87

## Learning Objectives

Understand the debate over the influence of biological and cultural factors on behavior. Learn how the internet and global culture influence local cultures.

## Terms to Know

sociobiology • instincts • nationalism • cultural lag

## Concept Checks

1. Explain the nature/nurture debate. How is recent sociological research on the relationship between genetics and social influences on human behavior contributing to this debate?
2. How is the internet affecting local cultures?
3. What is “cultural lag”? Think of a time when U.S. society has grappled with the implications of a new technology.

# Glossary

culture
: The values, norms, and material goods characteristic of a given group. Like the concept of society, the notion of culture is widely used in sociology and the other social sciences (particularly anthropology). Culture is one of the most distinctive properties of human social association.

society
: A group of people who live in a particular territory, are subject to a common system of political authority, and are aware of having a distinct identity from other groups. Some societies, such as hunting and gathering societies, are small, numbering no more than a few dozen people. Others are large, numbering millions. Modern Chinese society, for instance, has a population of more than a billion people.

cultural universals
: Values or modes of behavior shared by all human cultures.

marriage
: A socially approved sexual relationship between two individuals. Marriage historically has involved two persons of opposite sexes, but in the past decade, marriage between same-sex partners has been legalized in a growing number of states and nations throughout the world. Marriage normally forms the basis of a family of procreation—that is, it is expected that the married couple will produce and bring up children.

nonmaterial culture
: Cultural ideas that are not themselves physical objects.

material culture
: The physical objects that a society creates that influence the ways in which people live.

values

Ideas held by individuals or groups about what is desirable, proper, good, and bad. What individuals value is strongly influenced by the specific culture in which they happen to live.

norms

Rules of conduct that specify appropriate behavior in a given range of social situations. A norm either prescribes a given type of behavior or forbids it. All human groups follow definite norms, which are always backed by sanctions of one kind or another, varying from informal disapproval to physical punishment.

symbol

One item used to stand for or represent another, as in the case of a flag symbolizing a nation.

signifier

Any vehicle of meaning and communication.

semiotics

The study of the ways in which nonlinguistic phenomena can generate meaning, as in the example of a traffic light.

language

The primary vehicle for meaning and communication in a society, language is a system of symbols that represent objects and abstract thoughts.

linguistic relativity hypothesis

A hypothesis, based on the theories of Edward Sapir and Benjamin Lee Whorf, that perceptions are relative to language.

cultural turn

Sociology's recent emphasis on the importance of understanding the role of culture in daily life.

hunting and gathering societies

Societies whose mode of subsistence is hunting animals, fishing, and gathering edible plants.

pastoral societies

Societies whose subsistence derives from the rearing of domesticated animals.

agrarian societies

Societies whose means of subsistence are based on agricultural production (crop growing).

industrialization

The process of the machine production of goods.

industrialized societies

Strongly developed nation-states in which the majority of the population works in factories or offices rather than in agriculture, and most people live in urban areas.

nation-states

Particular types of states, characteristic of the modern world, in which governments have sovereign power within defined territorial areas, and populations are citizens who know themselves to be part of single nations.

colonialism

The process whereby Western nations established their rule in parts of the world away from their home territories.

cultural capital

The accumulated cultural knowledge within a society that confers power and status.

emerging economies

Countries located primarily in the Global South, such as India and Singapore, that over the past three to four decades have begun to develop a strong industrial base.

cultural appropriation

The adoption of one cultural group's elements by another cultural group.

subcultures

Values and norms held by a group within a wider society that are distinct from those of the majority.

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Cultural groups within a wider society that largely reject the values and norms of the majority.

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The process by which different cultures are absorbed into a mainstream culture.

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A condition in which ethnic groups exist separately and share equally in economic and political life.

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The tendency to look at other cultures through the eyes of one's own culture, and thereby misrepresent them.

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The practice of judging a society by its own standards.

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nationalism

A set of beliefs and symbols expressing identification with a national community.

cultural lag

The idea, introduced by William Ogburn, that changes in cultural values and norms take time to catch up with technological developments.

# 4 Socialization and the Life Course

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Which of the following is considered the “most important” value that parents in the United States should instill in their children today?

1. **Creativity**
2. **Being responsible**
3. **Religious faith**
4. **Obedience**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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## LEARNING OBJECTIVES

1. **Basic Concepts** Understand how the four main agents of socialization contribute to social reproduction. Learn the stages of the life course, and see the similarities and differences between cultures.
2. **Theories of Socialization** Compare and contrast the theories of child development according to Mead, Cooley, Piaget, Freud, and Chodorow.
3. **Research on Socialization Today: Race Socialization** Learn how recent research reveals the ways that parents teach children about the meaning of racial identity.
4. **Unanswered Questions** Consider the influence of social factors, especially mass media and social media, on gender learning. Analyze a new approach to combating bullying.

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When you think about the kind of parent you might someday be, what values do you hope to instill in your children? Would you like them to be successful? Creative? Well-mannered? Kind? Obedient? Religious? In 2014, the Pew Research Center asked more than 3,000 parents in the United States to indicate which of 12 qualities they believed were "most important" to instill in their children. "Being responsible" ranked first, followed closely by "hard work" (Parker, 2014). "Religious faith" ranked third, while "creativity," "tolerance," and "curiosity" scored the lowest rankings.

These data show that American parents hold nearly universal beliefs that children should be kind, responsible, productive members of society; more than 90 percent of those polled ranked responsibility and hard work as "important," and 86 percent each rated "helping others" and "being well-mannered" as very important. Think about the ways that your parents, schoolteachers, siblings, friends, and even your boss at your most recent job instilled such values in you. Whether lecturing you on "being responsible," serving as a positive role model, or praising you for a job well done, these efforts are examples of socialization, or the lifelong process of learning the norms, values, behavior, and social skills appropriate to your social position, such as your age, gender, or social class.

Try to recall the lessons you learned on your first day of kindergarten. These are likely very different from the messages you received at your college orientation session when you first arrived on campus. A core aspect of socialization is that the lessons one learns must be appropriate to one's level of maturity. For example, the Pew study found that parents of teenagers are more likely than parents of younger children to emphasize independence and good manners, while parents of young children are slightly more likely to rate a child's creativity as highly important.

The lessons that parents deem essential for their children also vary over historical time. In the classic *Middletown* studies, a sociological examination of everyday life in the quintessentially "middle American" city of Muncie, Indiana, in the early 1920s, researchers asked parents what traits they valued in their children. The most commonly named trait was "obedience" (Lynd & Lynd, 1929). When residents of Muncie were interviewed again, more than 50 years later, however, the value of "obedience" was barely uttered, giving way to "autonomy" and "independence" (Alwin, 2008).

These changes reflect larger shifts in the roles and opportunities facing young people; in earlier historical periods when most children would grow up to work in factories or farms, obedience would be a valued and useful trait on the job. By the late twentieth century, however, when children would grow up to become white-collar professionals, their career prospects would depend on their capacity for independent thinking and creativity. In this way, socialization reflects not only the social position that a child has but the positions that a child will someday occupy.

The examples just cited illustrate the important sociological concept of socialization, or the ways we learn to become human. Socialization is the process whereby infants gradually become self-aware, knowledgeable people, skilled in the ways of their culture and historical time period. It also describes the processes whereby preschool-age children learn to be students, students learn to be workers, and childless persons learn to become parents. Most social roles we hold in life seem "natural" but actually involve intense socialization, or learning how to successfully navigate one's roles and relationships throughout the life course.

Socialization is a key mechanism contributing to social reproduction—the process whereby societies have structural continuity over time. During socialization, especially in the early years, children learn the ways of their elders, thereby perpetuating their values, norms, and social practices across the generations. All societies have characteristics that endure over time, even though their members change as individuals are born and die. North American society, for example, has many distinctive social and cultural characteristics that have persisted for generations—such as the fact that English is the main language spoken.

Socialization connects different generations to one another (Turnbull, 1983). The birth of a child alters the lives of those who are responsible for the child's upbringing—who themselves undergo new learning experiences. Older people, while of course remaining parents, forge a new set of relationships with another generation when they become grandparents. Although cultural learning is much more intense in infancy and early childhood than later in life, learning and adjustment continue through the life course.

In the sections to follow, we continue the theme of nature interacting with nurture introduced in the previous chapter. We first explore the main agents of socialization—families, schools, peers, and the media—considering how socialization contributes to social reproduction. We then analyze human development from infancy to early childhood, identifying the main stages of change. Different writers have offered a number of theoretical interpretations of how and why children develop as they do, and we describe and compare these, including theories that explain how people develop gender identities. We introduce recent research on the process of race socialization, exploring the ways that parents teach children about the meaning of racial identity. To conclude the chapter, we consider questions surrounding the influence of social factors on gender learning, as well as the issue of bullying and what we can do about it.

# Glossary

socialization
: The social processes through which children develop an awareness of social norms and values and achieve a distinct sense of self. Although socialization processes are particularly significant in

infancy and childhood, they continue to some degree throughout life. No individuals are immune from the reactions of others around them, which influence their behavior at all phases of the life course.

life course

The various transitions and stages people experience during their lives.

social reproduction

The process of perpetuating values, norms, and social practices through socialization, which leads to structural continuity over time.

# 1 BASIC CONCEPTS

**Understand how the four main agents of socialization contribute to social reproduction. Learn the stages of the life course, and see the similarities and differences between cultures.**

## Agents of Socialization

Sociologists often speak of socialization as occurring in two broad phases, involving numerous agents of socialization—that is, groups or social contexts in which significant processes of socialization occur. Primary socialization, which occurs in infancy and childhood, is the most intense period of cultural learning. It is the time when children learn language and basic behavioral patterns that form the foundation for later learning. The family is the main agent of socialization during this phase. Secondary socialization occurs later in childhood and in maturity. In this phase, other agents of socialization, such as schools, peer groups, organizations, the media, the workplace, religious organizations, and even the government become socializing forces.

Social interactions in these contexts help people learn (and unlearn) the values, norms, and beliefs of their culture. Importantly, socialization is a lifelong process and does not end in childhood. Additionally, socialization can be a process of learning, relearning, and unlearning. For instance, resocialization refers to the process whereby people learn new rules and norms when entering a new social world. For instance, mild resocialization might occur if we move to a different nation and must learn a new language, customs, eating habits, and basic rules of etiquette, such as bowing to a new colleague rather than shaking hands. A more extreme form of resocialization may occur if we enter an institution such as the military or prison, where individuals often need to learn an entirely new set of rules, schedules, and modes of interacting with others. For instance, taken-for-granted freedoms, such as being able to snack whenever we want, are curtailed in highly structured settings like the military, where meals are scheduled and ritualized. Likewise, desocialization entails unlearning rules and shedding the privileges

associated with a particular role, as an athlete who has retired from competitive sports must do.

Socialization can happen in the present, where we learn as we go, or it may occur far in advance of our adopting a social role or participating in a particular social world. Anticipatory socialization refers to the process whereby we learn about what a particular role might entail before we enter it. For instance, parenting classes for pregnant women and their partners provide guidance that won't be used for several months. Summer camps for high school students prepare young people to someday live away from home or at college, independent from their parents. As we shall soon see, many individuals and institutions—from parents to schools—play a critical role in the socialization process.

## Families

Because family systems vary widely, the infant's range of family contacts is not standard across cultures. The mother tends to be the most important individual in the child's early life, but the nature of relationships between mothers and their children is influenced by the form and regularity of their contact. This, in turn, is conditioned by the character of family institutions and their relation to other groups in society.

In modern societies, most early socialization occurs within a small-scale family context. Most American children grow up within a domestic unit containing one or two parents and perhaps one or two other children. In many other cultures, by contrast, aunts, uncles, and grandparents are part of a single household and serve as caretakers even for very young infants. Even within U.S. society, family contexts vary widely. Some children grow up in single-parent households; some have two mother figures and/or two father figures (divorced parents, stepparents, or same-sex parents). Many women with families work for pay outside the home and return to their paid work soon after the birth of their children. In spite of these variations, families normally remain the major agent of socialization from infancy to adolescence and beyond, in a sequence of development connecting the generations.

Annette Lareau found that upper-middle-class parents engage in "concerted cultivation," actively monitoring their children's development.

The centrality of family as an agent of socialization has changed throughout history. In most premodern societies, the family into which a person was born determined the individual's lifelong social position. In modern societies, social position is not inherited at birth, yet the region and social class of the family have a distinct effect on patterns of socialization. Children pick up ways of behavior characteristic of their parents or others in their neighborhood or community. Varying patterns of child-rearing and discipline, together with contrasting values and expectations, are found in different sectors of large societies. For instance, sociologist Annette Lareau (2011) observed parents and children in their own homes and found that working-class parents and middle-class parents approach child-rearing in different ways. Working-class parents promote what Lareau refers to as the *accomplishment of natural growth*; their children enjoy long periods of unstructured free time, often spent with friends and extended family members. In contrast, upper-middle-class parents practice what Lareau calls *concerted cultivation*, actively fostering their kids' talents by enrolling them in a range of structured educational and extracurricular activities and closely monitoring their development. This latter approach provides children with the opportunities and skills necessary not only to succeed in school

and, later, in the workforce, but also to maintain their social-class position.

Of course, few of us unquestionably adopt our parents' outlook. This is especially true in the modern world, where change is pervasive. Moreover, the very existence of a range of socializing agents in modern societies leads to divergences among the outlooks of children, adolescents, and parents.

## Schools

Schools are another important socializing agent. Although schooling is a formal process, whereby students pursue a defined curriculum of subjects, schools are agents of socialization in more subtle respects. For instance, children must be punctual to class, stay quiet during lessons, and observe rules of discipline. They must accept the authority of the teaching staff. In some school systems, students say the Pledge of Allegiance to the American flag each morning and celebrate "Constitution Day" (Westheimer, 2007). This is also a way through which the government, another agent of socialization, instills in children cultural values such as patriotism. Teachers' reactions affect the expectations children have of themselves, which in turn become linked to their job experience when they leave school. Peer groups are often formed at school, and the system of age-based classes reinforces their influence.

Another key mechanism through which schools socialize children is the hidden curriculum, which refers to the subtle ways in which teachers expose students with different social identities—boys, girls, and those with fluid gender identities; middle class versus working class; and Black versus White—to different messages and curricular materials. In Chapter 16, we delve much more fully into the ways that schools socialize children, often unwittingly perpetuating race, class, and gender inequalities. For instance, think about the kind of classes you and your fellow students took in high school. You might have found that students from economically disadvantaged backgrounds were "tracked" into classes like automotive repair, whereas wealthier classmates were channeled into college-prep classes (Oakes & Guiton, 1995). Likewise, boys historically were encouraged to take advanced science, technology, engineering, and math (STEM) classes, whereas girls were not (Basow,

2004). These patterns have changed in the past decade, and girls are now enrolled in high-level high school math and science courses like calculus, algebra, and chemistry at the same rate as their male classmates, with the exception of computer science and engineering (National Science Foundation, 2018). In this way, schools have perpetuated the status quo, including social inequalities.

## Peer Relationships

Children construct gender meanings through the games they play with their peers.

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The peer group consists of individuals of a similar age. In some cultures, particularly small, traditional societies, peer groups are formalized as age-grades (normally confined to males), with ceremonies or rites that mark the transition from one age-grade to another. Those within a particular age-grade generally maintain close connections throughout their lives. Peers may experience rites of passage together, such as kindergarten graduation, religious rites like bar or bat mitzvah and confirmation, or driver's ed or SAT prep. These events are developmental markers and are also experiences that build feelings of unity among peers.

Although the family's importance in socialization is obvious, it is less apparent, especially in Western societies, how significant peer groups are. Yet even without formal age-grades, children over the age of four or five usually spend a great deal of time in the company of friends who are the same age. Given the high proportion of working parents whose children play together in day-care centers, peer relations are even more important today than before (Corsaro, 1997; Harris, 1998).

In her classic book *Gender Play* (1993), sociologist Barrie Thorne explores how children learn what it means to be male or female. (You will learn three classic theories of gender socialization later in this chapter.) Rather than seeing children as passively learning the meaning of gender from their parents and teachers, Thorne examines how children actively create and re-create the meaning of gender in their interactions with one another. The social activities that schoolchildren do together can be as important as other agents for their socialization.

Thorne spent two years observing fourth- and fifth-graders at two schools in Michigan and California, sitting in the classroom with them and observing their activities outside the classroom. She watched games—such as "chase and kiss," "cooties," and "goin' with," as well as children teasing one another—to learn how children construct and experience gender meanings in the classroom and on the playground.

Thorne found that peer groups greatly influence gender socialization, particularly as children talk about their changing bodies. The social context determined whether a child's bodily change was experienced with embarrassment or pride. As Thorne (1993) observed, "If the most popular girls started menstruating or wearing bras (even if they didn't 'need to'), then other girls wanted those changes too. But if the popular girls didn't wear bras and hadn't . . . gotten their periods, then these developments were seen as less desirable."

Peer relations have a significant effect beyond childhood and adolescence. Informal groups of people of similar ages, at work and in other situations, are usually of enduring importance in shaping individuals' attitudes and behavior. Thorne's research is a powerful reminder that children are social actors who help create their social world and influence their own socialization. Still, the effect of societal and cultural influences is also tremendous: Children's activities and values are also determined by influences such as the media.

# Mass Media

Newspapers, periodicals, and journals flourished in the West from the early 1800s onward but had a limited readership. It was not until the early 1900s that such printed material became part of the daily experience of millions of people, influencing their attitudes and opinions. The spread of mass media soon included electronic communication—radio, television, audio recordings, videos, and online communication, including social networking sites such as Facebook, Twitter, and Instagram. Today, it is a rare American who goes a day (or even an hour) without reading an article, watching a video, or listening to a podcast online. In fact, 97 percent of teens go online at least once a day, while 35 percent use the internet "almost constantly" (Vogels et al., 2022). Fully 72 percent of all Americans and 84 percent of young adults (ages 18–29) use social media, with YouTube being the most widely used platform (Auxier & Anderson, 2021). Young adults are also tethered to their smartphones. Nearly all adults (96 percent) between ages 18 and 24 own a smartphone (Pew Research Center, 2021b), and they check their phones twice as much as the national average of 96 times a day (Asurion, 2019).

Americans also spend a large portion of their leisure time consuming more traditional forms of media. According to the American Time Use Survey, Americans watched an average of nearly three hours of television per day in 2021, representing more than half of their total leisure time (U.S. Bureau of Labor Statistics, 2022h). However, in recent years smartphone use has surpassed television viewing, especially for young people. According to data from the market research firm Nielsen, young adults ages 18 to 34 spend just under two hours per day watching live and time-shifted TV, yet 3.5 hours per day on the web or apps on their smartphone or tablets (Lee, 2019).

Media, in all their forms, have a powerful impact on our lives, and they are particularly influential in shaping the beliefs, behaviors, social interactions, and relationships of children, teens, and young adults. For instance, children and adolescents often model the gender roles and practices that they see on their favorite television shows. Fashion magazines, music videos, and, more recently, social media's fashion influencers are also cited as powerful influences on girls' body image, or their beliefs about "ideal" body weight and physique (Fardouly & Vartanian, 2016; Grabe et al., 2008). Yet media can also teach children

about topics with which their parents may be less familiar or comfortable, and can provide information and even a sense of solace for children who may be lacking support in their communities. For example, television shows like *I Am Jazz*, a reality show about the daily life of transgender teenager Jazz Jennings, has been praised for teaching messages of acceptance and providing a role model for children who may be conflicted about their own gender identity (*Time*, 2014). Trans youth also may use social media like Instagram to bolster and support fellow trans youth as they choose how to present themselves (Rutten, 2018).

Americans of all ages spend the majority of their leisure time consuming media, which can function as a powerful agent of socialization, especially for young kids and adolescents.

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The study of the impact of media on youth is a critically important topic, with extensive research focused on the effect of television, film, popular music, and other media on propensities toward aggression and violence. Classic studies by George Gerbner and his collaborators (1986) analyzed samples of prime-time and weekend daytime TV for all major American networks each year for more than two decades dating back to 1967. They charted the number and frequency of violent acts and episodes for a range of programs, defining violence as physical force directed against the self or others by which physical harm or death occurs. Their database included observations on 2,816 television programs; they also coded

34,882 characters according to many thematic, demographic, and activity categories (Media Education Foundation, 1997). On average, 80 percent of programs contained violence, with a rate of 7.5 violent episodes per hour. Children's programs showed even higher levels of violence, although killing was less common. Cartoons depict the highest number of violent acts and episodes of any type of television program (Gerbner et al., 1986). The level and number of media sources portraying extreme violence has only increased since that time, with video games, internet displays, and cell phone displays showing graphic violence in games like *Grand Theft Auto*, *Fortnite*, and *Mortal Kombat* (Huesmann, 2007).

The reason these trends are troubling is that decades of research document that witnessing violence, whether in person, via a recorded image like a live-actor television show or movie, or even in cartoons, increases the chances that a child will behave aggressively. In a now-classic experiment by psychologist Albert Bandura, children watched an adult play with Tinkertoys and a Bobo doll (a five-foot-tall inflated plastic doll). In one condition, the adult began by assembling the Tinkertoys for about a minute and then turned his attention to the doll. He approached the doll, punched it, sat on it, hit it with a mallet, tossed it in the air, and kicked it around the room while shouting things such as "Hit him in the nose." He did this for nine minutes while the child watched. Bandura had different versions of the experiment. In some cases, the child observed an actual actor; in another, the child witnessed a videotaped actor; and in a third, the child watched a cartoon version of the aggression. In the control-group condition, the actor worked with the tinker toys for the full 10-minute observation period. Relative to the control group, all three experimental groups of children subsequently engaged in more aggressive play, although a gradient emerged, where the effects of the actual actor were most powerful, followed by the videotaped actor and then the cartoon. Yet, in all three cases, the children imitated and acted out the aggressive play they had witnessed.

Given the powerful ways that violent media may socialize children into aggressive behaviors, researchers have become interested in studying how video games (especially violent video games) affect children. Ninety percent of teenagers (97 percent of teenage boys and 83 percent of teenage girls) play video games on their phone, computer, or a console such as PlayStation, Xbox, or Wii (Anderson & Jiang, 2018a). Given

what we've learned about socialization, is this a potentially harmful trend?

Researchers are finding that violent video games may affect youth in similar ways as violent television images. For instance, rapid-action games with very violent imagery may desensitize players to violence (Engelhardt et al., 2011). Yet emerging research also shows that some video games can have positive effects on children and their families. Roughly 55 percent of parents believe that playing video games helps families spend more time together (Entertainment Software Association, 2021). Research carried out by an association of manufacturers of video games may be biased, so researchers have also carried out independent studies. Emerging research shows that some video games like *Wii Fit* can strengthen intergenerational relations, especially if grandchildren and grandparents play these games together (Costa & Veloso, 2016). And recent work by neuroscientists and psychologists finds that some types of fast-paced video games dubbed "brain games" boost children's brain stimulation, cognitive development, spatial abilities, problem-solving skills, and even self-esteem (Granic et al., 2014).

Mass media is an important influence on socialization in all forms of society. Few societies in current times, even among more traditional cultures, remain untouched by the media (Huesmann, 2007). Electronic communication is accessible even to those who cannot read or write, and in the most impoverished parts of the world, it is common to find people owning radios, television sets, and smartphones. In this way, people throughout the globe are exposed not only to cultural messages from their own societies but increasingly to cultural and media images from across the world—a topic we will explore more fully in Chapter 20.

As new technologies evolve, researchers will be particularly interested in documenting how they help and hurt. In the past decade or two, for instance, social scientists have documented the benefits and problems linked to excessive smartphone use. Many benefits have been documented, including helping people stay in touch with friends and family far away, providing an easily accessible source of information and job opportunities, and even tracking one's own health and fitness (Silver et al., 2019). However, other evidence suggests that smartphones prevent people from separating their personal and work lives; perpetuate a culture of round-the-clock work and responsiveness to work-related demands; and diminish writing, emotional expression, and communication skills as

smartphone users increasingly interact via terse text and instant messaging (Wagner, 2015).

## Work

Flight attendants, and other service workers, must learn to manage their emotions on the job. Arlie Hochschild referred to this as "emotion work."

Work, in all cultures, is an important agent of socialization, although only in industrial societies do large numbers of people go to places of work separate from the home. In communities where people farmed nearby land or had workshops in their dwellings, work was not as distinct from other activities. In industrialized countries, joining the workforce ordinarily marks a much greater transition in an individual's life than beginning work in traditional societies does. Over the past two decades, however, rising numbers of workers carry out their jobs at home, facilitated in part by email and the internet, although the overall numbers are still modest. About 17.9 percent of U.S. workers, numbering almost 30 million, worked exclusively at home in 2021—a steep increase over the 5.7 percent, or 9 million people, who worked at home in 2019 (U.S.

Bureau of the Census, 2022h). Between 2017 and 2018, as many as one in three did at least some paid work at home, with the option of working at home more common among professional and managerial workers (Woods, 2020).

The work environment often poses unfamiliar demands, perhaps calling for major adjustments in the person's outlook or behavior. For example, when young people enter the workforce, they learn skills such as independence, self-efficacy, personal responsibility, responsibility for others, and how to develop effective relationships with nonfamily members (Greenberger & Steinberg, 1981). In addition to mastering the specific tasks of their job and internalizing cultural norms that guide appropriate professional behavior, many workers also need to learn how to "feel" on the job. Sociologists have explored in depth how individuals learn to manage their emotions in the workplace, focusing on ways that workers learn to hide negative emotions so they can foster good relationships with customers or manage the emotional distress they feel when they encounter sad or gruesome experiences on the job. Sociologist Arlie Hochschild (1983) has documented the ways that workers, especially women workers, learn to feel and then display socially acceptable emotions at work. For instance, flight attendants learn to keep a calm and cool demeanor, even when dealing with a surly passenger or flying through extreme turbulence. Health care workers, police officers, firefighters, and soldiers also must learn how to manage feelings such as fear, sadness, and disgust to do their job (e.g., Underman & Hirshfield, 2016). Schoolteachers and principals must remain calm and supportive, even when the children they work with act out (Maxwell & Riley, 2016). In these ways, individuals are socialized into the varied and complex skills they require to succeed in the workplace.

# Social Roles

Through socialization, individuals learn about social roles—socially defined expectations for a person in a given social position. The social role of doctor, for example, encompasses a set of behaviors that all doctors should assume, regardless of their personal opinions or outlooks. Because all doctors share this role, we can speak in general terms about the professional behavior of doctors, regardless of the specific individuals who occupy that position.

Some sociologists, particularly those associated with the functionalist school, regard social roles as unchanging parts of a society's culture; they are social facts. According to this view, individuals learn the expectations for social positions in their particular culture and perform these roles largely as they have been defined. Social roles do not involve negotiation or creativity. Rather, they prescribe, contain, and direct an individual's behavior. Through socialization, individuals internalize social roles and learn how to carry them out.

This view, however, is mistaken. It suggests that individuals simply take on roles rather than creating or negotiating them. In fact, socialization is a process in which humans can exercise agency; we are not simply passive subjects waiting to be instructed or programmed. Individuals come to understand and assume social roles through an ongoing process of social interaction.

# Identity

The cultural settings in which we grow up influence our behavior, but that does not mean that humans lack individuality or free will. The fact that from birth to death we are involved in interaction with others certainly conditions our personalities, values, and behavior. Yet socialization is also at the origin of our individuality and freedom. In the course of socialization, each of us develops a sense of identity and the capacity for independent thought and action.

The concept of identity in sociology is multifaceted. Broadly speaking, identity relates to people's understandings about who they are and what is meaningful to them. These understandings are formed in relation to certain attributes that take priority over other sources of meaning. Some of the main sources of identity are gender, sexual orientation, nationality, ethnicity, and social class. Sociologists often speak of two types of identity: social identity and self-identity (or personal identity). These types are analytically distinct but closely related to each other.

Social identity refers to the characteristics that other people attribute to an individual—markers that indicate who, in a basic sense, that individual is. At the same time, these characteristics place that individual in relation to others who share the same attributes. Examples of social identities are

student, parent, lawyer, Muslim, homeless, Asian, dyslexic, and married. All individuals have more than one social identity, reflecting the many dimensions of their lives. A person could simultaneously be a parent, an engineer, a Catholic, and a city council member. This plurality of social identities can be a source of conflict.

People often exhibit multiple social identities simultaneously, sometimes seemingly conflicting ones.

Most individuals organize meaning and experience in their lives around a primary identity that is continuous across time and place. Sometimes people organize their lives around the identity that is most *salient*, or personally meaningful and important. For instance, if being a devout follower of one's faith is very salient to an individual, they may eat particular foods, wear certain types of clothing, choose to socialize largely with fellow members of the community, and hold beliefs consistent with their religious teachings (Stryker & Serpe, 1994).

Sociologist Everett Hughes noted that some identities can overpower all the other traits an individual possesses; these identities are referred to as master statuses. Race, sex, age, and visible body features are among the most common master statuses. For instance, people who are morbidly obese may find that many of their interactions and behaviors are tied to their large bodies, in part because the social structure is organized in such a way as to remind them constantly of their weight; these reminders include such things as narrow airplane or movie theater seats, lack of clothing options, and disapproving looks and comments by others. A person who happens to weigh 300 pounds might also be a parent, a schoolteacher, a best friend, and a computer whiz, yet others who interact with the individual may only see the weight and may treat them accordingly.

Social identities involve a collective dimension. They mark ways that individuals are the same as others. Shared identities—predicated on common goals, values, or experiences—aside from forming an important base for social movements, serve as a powerful source of personal meaning or self-worth.

If social identities mark ways in which individuals are the same as others, self-identity (or personal identity) sets us apart as distinct individuals. Self-identity refers to the process of self-development through which we formulate a unique sense of ourselves and our relationship to the world. The notion of self-identity draws heavily on the work of symbolic interactionists. Our constant negotiation with the outside world shapes our sense of self, linking our own personal and public worlds. Though the cultural and social environment is a factor in shaping self-identity, individual agency and choice are key.

Tracing the changes in self-identity from traditional to modern societies, we can see a shift away from the fixed, inherited factors that previously

guided identity formation, such as membership in social groups bound by social class or ethnicity. People's identities are now more multifaceted and less stable, owing to urban growth, industrialization, and the breakdown of earlier social formations. Individuals have become more socially and geographically mobile. Freed from the homogeneous communities of the past, people now find that other sources of personal meaning, such as gender identity, sexual orientation, or political beliefs, play a greater role in their sense of identity.

Today we have unprecedented opportunities to create our own identities. We are our own best resources in defining who we are, where we have come from, and where we are going. Now that the traditional signposts of identity have become less essential, the social world confronts us with a dizzying array of choices about who to be, how to live, and what to do, without offering much guidance about which selections to make. The decisions we make in our everyday lives—about what to wear, how to behave, and how to spend our time—help make us who we are. Through our capacity as self-conscious, self-aware human beings, we constantly create and re-create our identities.

# Socialization Through the Life Course

The transitions through which individuals pass during their lives may seem biologically fixed—from childhood to adulthood and eventually to death. But the stages of the human life course are social as well as biological. They are influenced by cultural differences and material circumstances in various types of societies. For example, in most contemporary wealthy Western nations, death is usually thought of in relation to old age because most people enjoy a life span of 79 years or more. In traditional societies of the past, however, more people died at younger ages than survived to old age.

## Childhood

In modern societies, childhood is considered a distinct stage of life between infancy and adolescence. Yet the concept of childhood has developed only over the past two or three centuries. In earlier societies, young people moved directly from a lengthy infancy into working roles within the community. The French historian Philippe Ariès (1965) has

argued that childhood did not exist in medieval times. In the paintings of medieval Europe, children are portrayed as little adults, with mature faces and the same style of dress as their elders. Children took part in the same work and play activities as adults, rather than in the childhood games we now take for granted.

Right up to the twentieth century, in the United States and most other Western countries, children were put to work at what now seems a very early age. There are countries in the world today, in fact, where young children do full-time work, sometimes in physically demanding circumstances (for example, in coal mines). According to the International Labor Organization, more than 160 million child laborers globally are working today (U.S. Department of Labor, 2022b). The ideas that children have rights and that child labor is morally repugnant are recent developments that have not yet been achieved worldwide.

Because of the long period of childhood that we recognize today, societies are now, in some respects, more child-centered than traditional ones were. But a child-centered society, it must be emphasized, is not one in which all children experience love and care from parents or other adults. The physical and sexual abuse of children and the trafficking of child labor are realities, albeit statistically rare ones, of family life in present-day society. Yet child abuse has been recognized as a social problem only relatively recently. Rates of child abuse are difficult to calculate, due to disagreement regarding definitions of child abuse and children's fear or inability to report abuse (U.S. Department of Health and Human Services, 2016). Most experts agree that roughly 3.5 million reports of child abuse are made to law enforcement authorities each year; roughly 61 percent of these cases involve neglect, 11 percent involve physical abuse, and 7 percent involve sexual abuse (Administration for Children and Families, 2021).

It is possible that as a result of changes in modern societies, childhood as a distinct stage is again diminishing. Some observers have suggested that children now grow up so fast that this is in fact the case. They point out that even small children may watch the same television programs and use the same apps as adults, thereby becoming much more familiar early on with the adult world than did preceding generations. Yet others counter that children today are coddled by their "helicopter" parents, shielded from hardships and challenges that prior generations experienced (Lemoyne & Buchanan, 2011). Critics note that practices like giving

children trophies for participating in a sport, rather than excelling in a sport, spare children from some of the difficult lessons that adults must learn about competition, competence, and self-sufficiency.

## The Teenager

The idea of the teenager also didn't exist until the early twentieth century, when compulsory education and child-labor laws were enacted. Prior to that time, teenagers were not required to attend school, so adolescence was a time for working in fields and factories and for marrying and bearing children. Today, by contrast, adolescence is considered a time to learn, grow, and make choices about the kind of adult one wants to someday become.

The biological changes involved in puberty (the point at which a person becomes capable of adult sexual activity and reproduction) are universal. Yet in many cultures, these do not produce the turmoil and uncertainty often found among young people in modern societies. In cultures that foster age-grades, for example, which hold ceremonies that signal a person's transition to adulthood, the process of psychosexual development seems easier to negotiate. Adolescents in such societies have less to "unlearn" because the pace of change is slower. There is a time in Western societies when children are required to put away their toys and break with childish pursuits. In traditional cultures, in which children already work alongside adults, this process of unlearning is much less jarring.

In Western societies, teenagers are betwixt and between: They often try to act like adults, but they are treated by law as children. They may wish to go to work, but they are required to stay in school. Teenagers in the West live in between childhood and adulthood, growing up in a society subject to continuous change.

## Young Adulthood

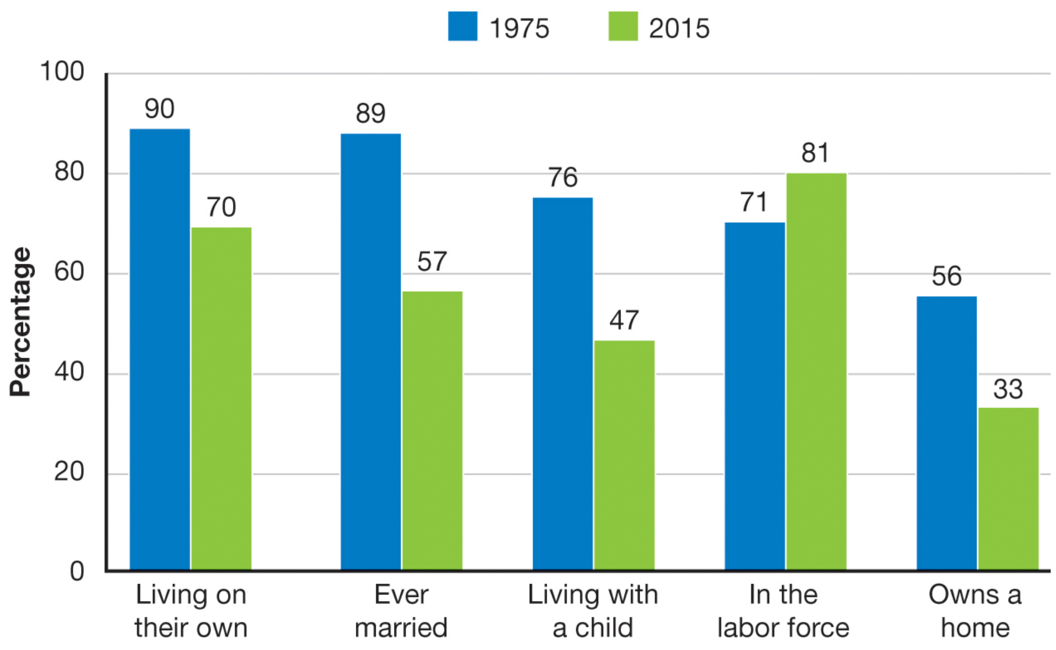
Young adulthood, also referred to as "emerging adulthood," is typically defined as roughly ages 20 to 30 (Arnett, 2000). This period is considered a transition between the carefree years of childhood and adolescence, and the responsibilities of marriage, parenthood, and home ownership that

often accompany mid-adulthood. Part of the reason for the emergence of this distinctive life course stage is that scholars have observed a "delayed transition to adulthood" among young people in the late twentieth and early twenty-first centuries. Particularly among affluent groups, people in their early twenties take the time to travel, go to college or graduate school, try out a few different jobs, and explore sexual, political, and religious affiliations. The importance of this postponement of the responsibilities of full adulthood is likely to grow, given the extended period of education and career exploration many people now undergo.

Although it is difficult to pinpoint exactly when one makes the "transition to adulthood," sociologist Frank Furstenberg has identified five benchmarks that are considered critical to the adulthood transition: leaving the home of one's parents, finishing school, getting married, having a child, and being financially independent. In 1960, fully 65 percent of men and 77 percent of women had achieved all five milestones by age 30. In 2010, by contrast, only 25 percent of men and 39 percent of women had done all five by their thirtieth birthdays (Furstenberg, 2010; Kennedy & Furstenberg, 2013). These statistics clearly show that the transition to adulthood is being delayed today and that some benchmarks historically considered as signifiers of adulthood, such as becoming a parent, may be less central to one's identity as an adult in the twenty-first century (**Figure 4.1**).

Figure 4.1

**THIRTY-YEAR-OLDS: 1975 VS. 2015**




Source: U.S. Bureau of the Census, 2016b.

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Although social critics (and anxious parents) wring their hands and lament that young people today “refuse to grow up,” Furstenberg offers a much more positive interpretation of these data. Young adults today have the opportunity to pursue education and “try out” many professions and romantic partners before settling on one career or one spouse. This period of exploration allows young people to figure out a life that works best for them in the long term. Young people today also have the option *not* to make particular transitions, without fear of stigma. For instance, young people are more likely than ever before to cohabit rather than marry, to stay single, and to remain child-free (Furstenberg, 2010). Young people themselves also adhere to a much broader view of what “adulthood” is, defining it in terms of abstract traits like self-reliance and happiness, rather than the attainment of particular milestones like home ownership (Henig, 2010).

## Midlife

Most young adults in the wealthy industrialized world can expect to live well into old age. In premodern times, few could anticipate such a future with much confidence. Death through sickness or injury was much more frequent among all age groups than it is today, and women faced a high

rate of mortality in childbirth. Given these advances in life expectancy, a "new" life course stage has been recognized in the twentieth century: midlife, or middle age (Cohen, 2012).

Midlife, the stage between young adulthood and old age, is generally believed to fall between the ages of 45 and 65. However, midlife is distinct from other life course stages in that there is not an "official" or legal age of entry. For example, American youth become legal adults at age 18, whereas age 65 is generally believed to signify the transition to old age and the receipt of retirement benefits. One's entry to midlife, by contrast, tends to be signified by the social roles one adopts (or relinquishes). While some scholars believe that menopause, or the loss of reproductive potential, signals women's transition to midlife, others believe that for both men and women, midlife is marked by transitions such as the "empty nest" stage (when children leave the family home).

Midlife is also a psychological turning point where men and women may assess their past choices and accomplishments and make new choices that prepare them for the second half of life. Keeping a forward-looking outlook in middle age has taken on a particular importance in modern societies. Most people do not expect to be doing the same thing their whole lives, as was the case for the majority in traditional cultures. For example, midlife persons today are more likely than ever to divorce, a phenomenon that has been called "gray divorce." One of the reasons why some people in their fifties and sixties end their marriages is that they recognize that they have many years of life ahead, and they choose to leave behind unsatisfying marriages and instead opt for singlehood or new romantic partnerships (Brown & Lin, 2012).

## Later Life

Old age has been reinvented in recent decades, as older adults compose an increasingly large share of the population both in the United States and worldwide. In 1900, just 4 percent of the U.S. population was age 65 or older. By 2020, that proportion exceeded 17 percent. The older population is projected to double by 2060, at which point nearly one in four Americans will be an older adult (Carr, 2023). The same trend is found in all industrially advanced countries. Alongside these population shifts, the social roles of older adults have shifted as well.

In traditional societies, older people were accorded great respect. Among cultures that included age-grades, the elders usually had a major—often the final—say in matters of importance to the community. Within families, the authority of both men and women increased with age. In industrialized societies, by contrast, older people tend to lack authority within both the family and the social community.

Transition to the age-grade of elder in a traditional culture often marked the pinnacle of an individual's status. In modern societies, retirement brings the opposite. No longer living with their children and often having retired from paid work, older people may find it difficult to make the final period of their life rewarding. People used to think that those who successfully coped with old age relied on their inner resources, becoming less interested in the material rewards of social life. Although this assumption may be true, it seems likely that in a society in which many are physically healthy in old age, an outward-looking view will become more prevalent. With advances in medical technologies, older adults are living and staying healthier longer than ever before. These extensions in life span have been accompanied by expanded opportunities for lifelong learning, with many older adults learning new skills and pursuing new leisure activities. Those in retirement might find renewal in what has been called the "third age," in which a new phase of education begins. (See also the discussion of lifelong learning in Chapter 12.)

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**CONCEPT CHECKS**

1. **What is social reproduction? What are some specific ways that the four main agents of socialization contribute to social reproduction?**
2. **Compare and contrast social roles and social identities.**
3. **What are the five stages of the life course, and what are some of the defining features of each stage?**
4. **Describe how the life course stage of childhood has changed since medieval times.**
5. **How is midlife different from the life course stages of childhood and old age?**

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# Glossary

agents of socialization

Groups or social contexts within which processes of socialization take place.

resocialization

The process whereby people learn new rules and norms upon entering a new social world.

desocialization

The process whereby people unlearn rules and norms upon exiting a particular social world.

anticipatory socialization

The process whereby we learn about a social role in advance of enacting the role.

hidden curriculum

Traits of behavior or attitudes that are learned at school but not included in the formal curriculum—for example, gender differences.

peer group

A group composed of individuals of similar age and social status.

age-grade

The system found in small traditional cultures by which people belonging to a similar age group are categorized together and hold similar rights and obligations.

mass media

Forms of communication, such as newspapers, magazines, radio, and television, designed to reach mass audiences.

social roles

Socially defined expectations of an individual in a given status or social position.

identity

The distinctive characteristics of a person's (or a group's) character that relate to who they are and what is meaningful to them. Some of the main sources of identity include gender, sexual orientation, nationality or ethnicity, and social class.

social identity

The characteristics that are attributed to an individual by others.

master status

A single identity or status that overpowers all the other identities one holds.

self-identity

The ongoing process of self-development and definition of our personal identity through which we formulate a unique sense of

ourselves and our relationship to the world around us.

# 2 THEORIES OF SOCIALIZATION

**Compare and contrast the theories of child development according to Mead, Cooley, Piaget, Freud, and Chodorow.**

One of the most distinctive features of human beings, compared with other animals, is that they are self-aware. How should we understand the emergence of a sense of self—the awareness that the individual has a distinct identity separate from others? During the first months of life, the infant possesses little or no understanding of differences between human beings and material objects and has no awareness of self. Children do not grasp concepts such as "I," "me," and "you" until the age of two or later. Only gradually do they understand that others have distinct identities, consciousnesses, and needs separate from their own.

The processes through which the self emerges and develops is much debated among contrasting theoretical perspectives (see Table 4.1). To some extent, this debate stems from the fact that the most prominent theories about child development emphasize different aspects of socialization. The American philosopher and sociologist George Herbert Mead mainly considered how children learn to use the concepts of "I" and "me." Charles Horton Cooley demonstrated the importance of other individuals for shaping a child's sense of self. Jean Piaget, the Swiss student of child behavior, studied many aspects of child development, but his best-known writings concern cognition—the ways in which children learn to think about themselves and their environment. Sigmund Freud and Nancy Chodorow focused on how children learn about gender differences and develop a gender identity.

## G. H. Mead and the Development of Self

Because Mead's ideas underlie a general tradition of theoretical thinking, symbolic interactionism, they have had a broad impact in sociology. Symbolic interactionism emphasizes that interaction between human beings occurs through symbols and the interpretation of meanings (see

Chapter 1). But Mead's work also describes the main phases of child development, concentrating on the emergence of a sense of self.

According to Mead, infants and young children develop as social beings by imitating the actions of those around them. Play is one way in which this development occurs. A small child will make mud pies, having seen an adult cooking, or will dig with a spoon, having observed someone gardening. Children's play evolves from simple imitation to more complicated games in which a child of four or five years old will act out an adult role. Mead called this "taking the role of the other"—learning what it is like to be in the shoes of another person. At this stage, children acquire a developed sense of self. Children achieve an understanding of themselves as separate agents—as a "me"—by seeing themselves through the eyes of others. We achieve self-awareness, according to Mead, when we learn to distinguish the "me" from the "I." The "I" is the unsocialized infant, a bundle of spontaneous wants and desires. The "me" is the social self. Individuals develop self-consciousness, Mead argued, by coming to see themselves as others see them.

A further stage of child development occurs when the child is eight or nine years old, the age at which children take part in organized games rather than unsystematic play. During this period, children begin to understand the values and morality that govern social life. To learn organized games, children must understand the rules of play and notions of fairness and equal participation. Children at this stage learn to grasp what Mead termed the generalized other—the general values and moral rules of the culture in which they are developing.

# Charles Horton Cooley and the Looking-Glass Self

According to Charles Horton Cooley, our self-concept is based on our interpretations of how others, such as our teachers and classmates, perceive us.

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Charles Horton Cooley was an early-twentieth-century sociologist who studied self-concept, or the ways we view and think about ourselves. How do we come to view ourselves as humorous or cranky? Intelligent? Kindhearted? Cooley argued that the notions we develop about ourselves reflect our interpretations of how others see us. His theory of the looking-glass self proposes that the reactions we elicit in social situations create a mirror in which we see ourselves. For example, if others regularly laugh at our jokes, we may perceive that they view us as funny, and in turn, view ourselves as such. Likewise, if our classmates and teachers praise us for our intelligent remarks in class, we may in turn start to view ourselves as smart.

Over time, mixed empirical evidence has led to reformulations of Cooley's classic theory. One refinement suggests that individuals take action to bring others around to their own views of themselves, rather than passively accepting what others think of them. For example, a student who sees herself as very intelligent may regularly answer questions in class, in an effort to ensure that her classmates also view her as very intelligent (Yeung & Martin, 2003). In this way, youth are not merely passive recipients but rather active agents in shaping others' perceptions. Despite critiques and refinements of looking-glass-self theory, this perspective exemplifies core themes of symbolic interactionism, and sets the groundwork for other theories that underscore the importance of perceptions and negotiations in shaping human behaviors and identities (for example, see labeling theory of deviance in Chapter 7).

# Jean Piaget and the Stages of Cognitive Development

Piaget emphasized the child's active capability to make sense of the world. Children do not passively soak up information, but instead select and interpret what they see, hear, and feel. Piaget described distinct stages of cognitive development during which children learn to think about themselves and their environment. Each stage involves the acquisition of new skills and depends on the successful completion of the preceding ones.

Piaget called the first stage, from birth up to about age two, the sensorimotor stage. At this stage, infants learn mainly by touching objects, manipulating them, and physically exploring their environment. Until age four months or so, infants cannot differentiate themselves from their environment. For example, a child will not realize that their own movements cause the sides of the crib to rattle. Objects are not differentiated from persons, and the infant is unaware that anything exists outside their range of vision. The infant gradually learns to distinguish people from objects, realizing that both have an existence independent of the child's immediate perception of them. The main accomplishment of this stage is children's understanding that their environment has distinct and stable properties.

The next phase, the preoperational stage, is the one to which Piaget devoted the bulk of his research. During this stage, which lasts from age two to age seven, children master language and use words to represent objects and images in a symbolic fashion. A four-year-old might use a sweeping hand, for example, to represent the concept airplane. Piaget termed the stage “preoperational” because children are not yet able to use their developing mental capabilities systematically. Children in this stage are egocentric in the sense that they interpret the world exclusively in terms of their own position. The child does not understand, for instance, that others see objects from a different perspective. Holding a book upright, the child may ask about a picture in it, not realizing that the person sitting opposite can see only the back of the book.

Children at the preoperational stage are not able to hold connected conversations with another person. With egocentric speech, what each child says is more or less unrelated to what the other speaker has said. Children talk together but not to one another in the same sense as adults do. During this stage, children have no general understanding of categories of thought that adults take for granted, such as concepts of causality, speed, weight, and number. Even if the child sees water poured from a tall, thin container into a shorter, wider one, they will not understand that the volume of water remains the same—and the child will conclude that there is less water because the water level is lower.

A third period, the concrete operational stage, lasts from age 7 to age 11. During this phase, children master abstract, logical notions such as causality. A child at this stage of development will recognize the false reasoning involved in the idea that the wide container holds less water than the narrow one, even though the water levels are different. The child becomes capable of carrying out the mathematical operations of multiplying, dividing, and subtracting. Children by this stage are much less egocentric. In the preoperational stage, if a girl is asked, “How many sisters do you have?” she may correctly answer, “One.” But if asked, “How many sisters does your sister have?” she will probably answer, “None,” because she cannot see herself from the point of view of her sister. The concrete operational child can easily answer such a question.

The years from 11 to 15 cover the formal operational stage. During adolescence, the developing child becomes able to grasp highly abstract and hypothetical ideas. When faced with a problem, children at this stage are able to review all the possible ways of solving it and go through them

theoretically to reach a solution. The young person at the formal operational stage can understand why some questions are trick ones. To the question, "What creatures are both poodles and dogs?" the individual might not be able to give the correct reply but will understand why the answer "poodles" is right and will appreciate the humor in it.

According to Piaget, the first three stages of development are universal, but not all adults reach the formal operational stage. The development of formal operational thought depends in part on processes of schooling. Adults of limited educational attainment tend to continue to think in more concrete terms and retain large traces of egocentrism.

# Sigmund Freud's Theory of Gender Identity

Perhaps the most influential, and controversial, theory of the emergence of gender identity is that of Sigmund Freud. According to Freud, the learning of gender differences in infants and young children centers on the possession or absence of the penis. "I have a penis" is equivalent to "I am a boy," while "I am a girl" is equivalent to "I lack a penis." Freud is careful to say that it is not just the anatomical distinctions that matter; the possession and absence of the penis are symbolic of masculinity and femininity, of power and lack of power, respectively.

Major objections have been raised against Freud's views, particularly by feminists but also by many other authors (Coward, 1984; Mitchell, 1975). First, Freud seems to identify gender identity too closely with genital awareness; other more subtle factors are surely involved. Second, the theory seems to depend on the notion that the penis is superior to the vagina, which is thought of as just a lack of the male organ. Yet why shouldn't the female genitals be considered superior to those of the male?

# Nancy Chodorow's Theory of Gender Identity

Although many writers have used Freud's approach in studying gender development, they have modified it in major respects. An important

example is the sociologist Nancy Chodorow (1978, 1988), who argues that learning to feel male or female derives from the infant's attachment to the parents from an early age. Children become emotionally involved with the mother because she is the most dominant influence in their early lives. At some point, this attachment has to be broken for the child to achieve a separate sense of self—to become less closely dependent.

Chodorow argues that the breaking process occurs in a different way for boys and girls. Girls remain closer to the mother—able, for example, to go on hugging and kissing her and imitating what she does. Because there is no sharp break from the mother, the girl, and later the adult woman, develops a sense of self that is more continuous with other people. Her identity is more likely to be merged with or depend on another's: first her mother's, later a man's. In Chodorow's view, this process of development fosters sensitivity and emotional compassion in women.

Boys gain a sense of self via a more radical rejection of their original closeness to the mother, forging their understanding of masculinity from what is not feminine. They learn not to be "sissies" or "mama's boys." As a result, boys are relatively unskilled in relating closely to others; they develop more analytical ways of looking at the world. They take a more active view of their lives, emphasizing achievement, but they have repressed their ability to understand their own feelings and those of others.

**Table 4.1 APPLYING SOCIOLOGY TO SOCIALIZATION AND THE LIFE COURSE**

| **THEORY** | **APPROACH TO UNDERSTANDING SOCIALIZATION** | **CONTEMPORARY APPLICATION** |
|---|---|---|

| THEORY | APPROACH TO UNDERSTANDING SOCIALIZATION | CONTEMPORARY APPLICATION |
|---|---|---|
| **G. H. Mead's theory of self** | Children learn to adopt the perspectives of others, and thus become self-aware. | A child may feel proud when a parent praises them. By adopting the parent's perspective, they become aware of their own good behavior. |
| **Cooley's looking-glass self** | Our self-concept is based on our perceptions of how others see us. | A college student feels accepted and popular when they receive lots of "likes" on their Instagram photo. |
| **Piaget's cognitive development model** | As children mature, they gradually acquire skills and capacities in reasoning, with the final stage encompassing abstract reasoning. | Young teens may gravitate to poetry and symbolic song lyrics because they have the capacity to understand abstractions. |
| **Psychoanalytic perspectives** | Freud and Chodorow believe that gender identity develops out of one's attachment to and separation from parents. | Cisgender girls may mimic the clothing and personal style of their mothers, whereas cisgender boys may mimic their fathers. |

| THEORY | APPROACH TO UNDERSTANDING SOCIALIZATION | CONTEMPORARY APPLICATION |
|---|---|---|
| **Gilligan's moral development theory** | Men and women use different moral criteria in their decision making, due to early socialization processes. | Men and women on a jury may react very differently to a defendant, as they may apply different values when assessing the motive and behavior. |

Chodorow's work has met with various criticisms. Janet Sayers (1986), for example, has suggested that Chodorow does not explain the struggle of women, particularly in current times, to become autonomous, independent beings. Women (and men), Sayers points out, are more contradictory in their psychological makeup than Chodorow's theory suggests. Femininity may conceal feelings of aggressiveness or assertiveness, which are revealed only obliquely or in certain contexts (Brennan, 1988). Chodorow has also been criticized for her narrow conception of the family based on a White, middle-class model. What happens, for example, in one-parent households or, as in many Chicano communities, in families where children are cared for by more than one adult (Segura & Pierce, 1993)?

These criticisms don't undermine Chodorow's work, however. Her ideas remain important because they teach us a good deal about the nature of femininity and help us understand the origins of "male inexpressiveness"—the difficulty men have in revealing their feelings to others (Balswick, 1983).

# Carol Gilligan's Theory of Moral Development

Carol Gilligan (1982) further developed Chodorow's analysis, concentrating on the images adult women and men have of themselves

and their attainments. Women, she agrees with Chodorow, define themselves in terms of personal relationships and judge their achievements in terms of their ability to care for others. Women's place in the lives of men historically has been that of caretaker and helpmate. But the qualities developed in these tasks are devalued by men, who see their own emphasis on individual achievement as the only form of success. Women's concern with relationships appears to men as a weakness rather than as the strength that in fact it is.

Gilligan carried out intensive interviews with about 200 American women and men of varying ages and social backgrounds. She asked a range of questions concerning their moral outlook and conceptions of self. When asked, "What does it mean to say something is morally right or wrong?" the men mentioned abstract ideals of duty, justice, and individual freedom, whereas the women raised the theme of helping others. The women were more tentative in their moral judgments than the men, seeing possible contradictions between following a strict moral code and avoiding harming others. Gilligan suggests that this outlook reflects the traditional situation of women, anchored in caring relationships, rather than the outward-looking attitudes of men. Women's views of themselves are based on successfully fulfilling the needs of others, rather than on pride in individual achievement (Gilligan, 1982). Gilligan's work has been widely critiqued by feminist scholars, however, on the grounds that it essentializes gender differences and reifies the (mis)perception that women are innate caregivers (Senchuk, 1990). If indeed women abide by an ethic of care, it is likely a function of societal expectations rather than inherent differences in men's and women's morality. Gender roles are socially constructed and evolve over time, so theories that emphasize innate differences between men and women or boys and girls may not be sufficient to characterize our ever-changing world.

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## CONCEPT CHECKS

1. **According to Mead, how does a child develop a social self? How is this view similar to, and different from, Cooley's perspective?**
2. **What are the four stages of cognitive development, according to Piaget?**
3. **How do Chodorow's and Gilligan's theories help us understand the influence of socialization on gender?**

4. **Name one feminist critique of Chodorow.**

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# Glossary

cognition
: Human thought processes involving perception, reasoning, and remembering.

social self
: The basis of self-consciousness in human individuals, according to the theory of G. H. Mead. The social self is the identity conferred upon an individual by the reactions of others. A person achieves self-consciousness by becoming aware of this social identity.

self-consciousness
: Awareness of one's distinct social identity as a person separate from others. Human beings are not born with self-consciousness but acquire an awareness of self as a result of early socialization. The learning of language is of vital importance to the processes by which the child learns to become a self-conscious being.

generalized other
: A concept developed by G. H. Mead, according to which the individual comes to understand the general values of a given group or society during the socialization process.

looking-glass self
: According to Charles Horton Cooley's theory, the reactions we elicit in social situations create a mirror in which we see ourselves.

sensorimotor stage
: According to Jean Piaget, a stage of human cognitive development in which a child's awareness of their environment is dominated by perception and touch.

preoperational stage
: A stage of cognitive development, in Jean Piaget's theory, in which the child has advanced sufficiently to master basic modes of logical thought.

egocentric
: According to Jean Piaget, the characteristic quality of a child during the early years of life. Egocentric thinking involves understanding objects and events in the environment solely in terms of one's own position.

concrete operational stage

A stage of cognitive development, as formulated by Jean Piaget, in which the child's thinking is based primarily on physical perception of the world. In this phase, the child is not yet capable of dealing with abstract concepts or hypothetical situations.

formal operational stage

According to Jean Piaget's theory, a stage of cognitive development at which the growing child becomes capable of handling abstract concepts and hypothetical situations.

# 3 RESEARCH ON SOCIALIZATION TODAY: RACE SOCIALIZATION

**Learn how recent research reveals the ways that parents teach children about the meaning of racial identity.**

Socialization research flourished in the 1970s, 1980s, and 1990s, as researchers explored the ways that social changes, like shifting gender roles, women's widespread entry into the paid labor force, and increased reliance on paid child care, affected childhood socialization. Yet socialization research can help us understand other contemporary social issues, such as the ways that Black families cope with violence and prejudice, and how parents socialize children to respect individual differences in our increasingly diverse society.

## Race Socialization

In recent years, the daily news has all too often reported incidents involving police officers killing unarmed Black men. On the heels of these tragedies, many African American parents struggle not only to explain these events to their children but also to raise their children (especially their sons) to navigate and thrive in this increasingly uncertain world (Canedy, 2016). Many parents realize that it is not accurate to tell children that we live in a color-blind world and that we should instead teach the next generation to respect people from all backgrounds and walks of life.

How did you learn about your racial or ethnic background? Did your parents ever teach you what it means to be a White, Black, Asian, or Latino American? Or whether, as a member of a particular ethnic or racial group, there are certain ways you should act? Sociologists have recently explored the process of race socialization, which refers to the specific verbal and nonverbal messages that older generations transmit to younger generations regarding the meaning and significance of race,

racial stratification, intergroup relations, and personal identity (Lesane-Brown, 2006).

The research team of sociologist Tony Brown and psychologist Chase Lesane-Brown has conducted rich and important work on race socialization, investigating the messages that parents teach, how these messages have changed over time, and the effects of this socialization on children's lives. Their work rests on the assumption that ethnic minority parents (especially Black parents) must socialize their children to be productive members of society, just as White parents do, yet they also face an additional challenge: raising children with the skills to survive and prosper in a society that often devalues Blackness. As part of race socialization, Black parents also may prepare their children to understand their heritage, cultures, and what it means to belong to a racial group that historically has occupied a low and stigmatized status in the United States (Brown & Lesane-Brown, 2006).

Brown and Lesane-Brown's research shows that while parents of all racial and ethnic groups discuss their heritage with their children, parents of color—especially Black parents—do so more often than White parents. For example, in one study, the researchers asked parents, "How often does someone in your family talk with your child about (his/her) ethnic/racial heritage?" (Brown et al., 2007). They found that Black, Hispanic, Asian, Native Hawaiian/Pacific Islander, American Indian, and multiracial families were significantly more likely than White families to discuss their ethnic/racial heritage with their young children. In fact, the odds of discussing children's ethnic/racial heritage in non-White families were 1.9 to 4.7 times the odds for White families.

What exactly do Black parents teach their children about race, race stratification, and race relations? Lesane-Brown, Brown, and colleagues (2005) developed a detailed index capturing the specific messages and lessons that parents pass down to their children, noting of course that families may vary in what they say and how they say it. Among the messages encompassed in race socialization are color blindness (e.g., "race doesn't matter"), individual pride (e.g., "I can achieve anything"), group pride (e.g., "I'm proud to be Black"), distrust of other racial or ethnic groups (e.g., "don't trust White people"), and deference to other racial or ethnic groups (e.g., "Whites are better than Blacks"). The lessons that Black adolescents and college students found to be the most useful, however, were those that emphasized pride and color blindness,

such as “race doesn’t matter” and “with hard work, you can achieve anything regardless of race” (Lesane-Brown et al., 2005).

Race is socially constructed, as we shall see in Chapter 11, so the experiences of racial minorities and understandings of race change across time and space. Given tremendous changes in the opportunities facing Black Americans throughout the twentieth century and dramatic declines in levels of racism, have the messages that Black parents transmit to their children changed over time? In a 2006 study, Brown and Lesane-Brown examined data collected in 1980 from a sample of Black Americans ages 17 to 101. The subjects were asked about the racial lessons they had learned from their parents. Specifically, they were given the question “When you were a child, were there things your parents or the people that raised you taught you to help you know what it is to be Black?” If respondents answered yes, they were asked the open-ended question “What are the most important things they did or told you?” The researchers also classified people based on the time period in which they turned age 16 to explore the ways that historical context might have shaped their early socialization experiences. Subjects were classified based on whether they came of age pre–*Brown v. Board of Education* (before 1954), during the era of civil rights protests (1957–1968), or after the peak of the civil rights protests (1969–1980).

In our increasingly global society, it’s more important than ever for teachers—and other agents of socialization—to promote positive racial identities.

Brown and Lesane-Brown (2006) identified five main themes from the open-ended questions. The messages of racial socialization were individual pride, racial-group pride, deference to and fear of Whites, color blindness, and the belief that Whites are prejudiced. However, the frequency with which these themes were mentioned varied across generations. Black parents were more likely to transmit messages about deference to and fear of Whites during periods of blatant racial segregation and legalized brutality (pre–*Brown v. Board of Education* birth cohort). Although the researchers expected that parents would transmit more "color-blind" messages to their children in the later post–civil rights era, they did not find support for their hypothesis. Rather, messages of racial equality were more frequently transmitted to children during the early pre–*Brown v. Board of Education* era; the researchers concluded that Black parents may have felt particularly compelled to assert that all groups are equal during the historical period when that assertion was contested most passionately by Whites.

What are the consequences of race socialization? Brown and Lesane-Brown (2006) found that the messages one receives during childhood have far-reaching implications for one's political attitudes and behaviors, including whether one supports voting for Black candidates and whether one believes that Blacks and Whites have the same chance to get ahead with respect to work and education. In other research, these scholars found that ethnic/race socialization is linked with better academic performance in elementary school. Interestingly, they found a curvilinear association, meaning that the positive effects of race socialization were most evident among children who had received moderately frequent messages; the positive effects were less evident among those who had parent-child conversations about their racial background either very frequently or very infrequently (Brown et al., 2009).

Understanding race socialization will become increasingly important for future cohorts of young people. In our rapidly globalizing society, children and young people will need to develop the skills and capacities to negotiate multicultural contexts in their everyday lives (Priest et al., 2014). Children of all ethnic and racial backgrounds will require the skills and attitudes to think positively about racial, ethnic, and cultural diversity. Parents, teachers, and other agents of socialization must also promote positive racial attitudes, counter negative attitudes, and enable

effective responses to racism when it occurs. Although race socialization historically has focused on raising Black children to fit in and get ahead in a racist world, scholars today recognize that White children, too, should be socialized to recognize and fight racism when they see it unfold (Priest et al., 2014).

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**CONCEPT CHECKS**

1. **What are the key lessons learned through the process of racial socialization?**
2. **Why is race socialization important in contemporary society?**

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# Glossary

race socialization
: The specific verbal and nonverbal messages that older generations transmit to younger generations regarding the meaning and significance of race.

# 4 UNANSWERED QUESTIONS

**Consider the influence of social factors, especially mass media and social media, on gender learning. Analyze a new approach to combating bullying.**

Although studies of socialization have become quite advanced over the past century, many open or unanswered questions are still the subject of much disagreement among sociologists. Some of the most significant have to do with gender role socialization—the learning of gender roles through social factors such as the family and the media. In recent years, however, researchers have become increasingly interested in how older children learn antisocial behaviors such as bullying; it is only by knowing how bullying is learned that we can figure out ways to stop it.

# Are Gender Differences Caused by Social Influences?

Many studies have examined the degree to which gender differences are the result of social influences. Studies of mother-infant interaction show differences in the treatment of boys and girls, even when parents believe their reactions to both are the same. Adults asked to assess the personality of a baby give different answers according to whether they believe the child is a girl or a boy. In one experiment, five young mothers were observed interacting with a six-month-old called Beth. They smiled at her often and offered her dolls to play with. She was seen as "sweet" and as having a "soft cry." The reaction of a second group of mothers to a child the same age, named Adam, was noticeably different. They offered him a train or other "male" toys to play with. Beth and Adam were actually the same child, dressed in different clothes (Will et al., 1976).

## Gender Learning

Gender learning by infants is almost certainly unconscious. Before a child can label themselves as either a boy or a girl, the child receives preverbal cues. For instance, male and female adults usually handle

infants differently. Women's cosmetics contain scents different from those the baby might associate with males. Systematic differences in dress, hairstyle, and so on provide visual cues for the infant in the learning process. By age two, children have a partial understanding of what gender is. They know whether they are boys or girls, and they can usually categorize others accurately. Not until age five or six, however, does a child know that a person's sex does not change, that everyone has gender, and that sex differences between girls and boys are anatomically based.

Parents play a pivotal role in gender learning, often unintentionally. A child's earliest exposure to what it means to be male or female comes from their parents. From the time their children are newborns, parents interact with their daughters and sons differently. They may dress their sons in blue and daughters in pink, or speak to girls in softer and gentler tones than they use with boys. One classic study found that parents have different expectations for their sons and daughters as early as one day after they are born, where infant girls are described as "soft" and "pretty" and boys as "energetic" and "strong" (Rubin et al., 1974). It's not surprising, then, that as children become toddlers, parents (especially fathers) engage in more rough-and-tumble play with boys and hold more give-and-take conversations with girls (Lytton & Romney, 1991).

Even parents who are sensitive to gender-equity issues and who challenge the notion of the male/female dichotomy may send subtle messages related to gender—messages that the developing child internalizes. Sex-role stereotypes and subtle messages about appropriate gender-typed behavior are so powerful that even when children are exposed to diverse attitudes and experiences, they may revert to stereotyped choices—especially in sociocultural and historical contexts that adhere to gender-typed social roles and expectations (Haslett et al., 1992). Children may even deny the reality of what they are seeing when it doesn't conform to their gender expectations. For instance, a child whose mother is a doctor may state that only men are doctors, and women are nurses (Sheldon, 1990).

Children's toys and activities also tend to follow stereotypical patterns. Studies of children's bedrooms in the contemporary United States consistently find that girls' rooms have more pink decoration and more dolls, whereas boys' rooms tend to have more blue tones, sports equipment, and vehicles (Pomerleau et al., 1990). A simple visit to a

department store or a big-box store illustrates the dominance of gender stereotypes, as retailers typically categorize their products by gender. Even toys that seem gender-neutral are not so in practice. Vanda Lucia Zammuner (1986) studied the toy preferences of children between 7 and 10 years of age in Italy and Holland; they included stereotypically masculine or feminine toys as well as toys presumed not to be gender-typed. The children and their parents were asked which toys were suitable for boys and which for girls. There was close agreement between the adults and the children. On average, the Italian children chose gender-differentiated toys more often than the Dutch children did—a finding that conformed to expectations because Italian culture holds a more traditional view of gender divisions than does Dutch society. As in other studies, girls from both societies chose gender-neutral or boys' toys far more often than boys chose girls' toys.

In her *Pink & Blue Project*, photographer JeongMee Yoon records girls' obsession with the color pink. What are the implications of the

gender-typed packaging and color coding we see in children's toys and clothing?

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But these stark gender divides are historically bound. Cultural analyses have found that the "blue is for boys, pink is for girls" divide is a twentieth-century social construction. In the nineteenth century and early decades of the twentieth century, boys and girls wore similar colors, mostly white (Paoletti, 2012). However, in the postwar era in the United States, the pink-blue gender divide emerged, and it persisted on and off throughout the late twentieth century. Yet the trend appears to be coming full circle, with retailers and shoppers alike abandoning this convention. For example, in 2015, Target, the nation's largest retailer, stopped dividing its toy departments into "boy" and "girl" sections and also discontinued the pink- and blue-colored walls previously used to draw attention to gender-typed toys. Recognizing that nearly every product for children is gender-typed, Target management also stopped dividing up other departments, such as bedding, by gender. Boys and girls might be equally likely to want a Star Wars or a Dora the Explorer comforter (Luckerson, 2015). The move was triggered, in part, by shoppers' concerns regarding the needless gender labeling of toys. Most famously, shopper Abi Bechtel noted a sign in Target's toy section differentiating "building sets" and "girls' building sets." The notion that gender-neutral toys are healthy for all children is rapidly spreading, with more and more manufacturers abandoning gender-typed colors and designs for their toys.

Like children's toys, children's books and television shows teach important, though subtle, lessons about gender. In the 1970s, Lenore Weitzman and her colleagues (1972) analyzed gender roles in some of the most widely used preschool children's books and found several clear differences in gender roles. Males played a much larger part in the stories and pictures than did females: they outnumbered females by a ratio of 11 to 1. When animals with gender identities were included, the ratio was 95 to 1. The activities of males and females also differed. The males engaged in adventurous pursuits and outdoor activities demanding independence and strength. When girls did appear, they were portrayed as passive and were confined mostly to indoor activities. Girls cooked and cleaned for the males or awaited their return. Much the same was true of the adult characters. Women who were not wives and mothers were imaginary creatures such as witches and fairy godmothers. In all the

books analyzed, not a single woman held an occupation outside the home. By contrast, the men were depicted as fighters, policemen, judges, kings, and so forth.

More recent research suggests a slight change but notes that the bulk of children's literature remains the same (McCabe et al., 2011). Children's books feature many more men and boys as lead characters than women and girls. Even when characters are animals, they tend to be male (McCabe et al., 2011). The specific messages conveyed in children's books are often quite traditional as well. Fairy tales, for example, still embody traditional attitudes toward gender and expectations for boys' and girls' ambitions. In versions of fairy tales from several centuries ago, the idea that "someday my prince will come" usually implied that a girl from a poor family might dream of wealth and fortune. Today that notion is tied to the ideals of romantic love. Some observers have noted that the popular Disney movie *Frozen* is a small step toward chipping away at such stereotypes. The lead character, Anna, discovers that her "handsome prince" is actually a cruel liar. Anna goes on to find her happy ending when she reconnects with her estranged older sister, Elsa, although Anna does eventually find true love with her ruggedly handsome suitor, Kristoff the iceman (Guilford, 2014).

Although there are exceptions, analyses of children's television programs and video games match the findings about children's books. In the most popular cartoons and games, most leading figures are male, and males dominate the active pursuits (Leaper & Bigler, 2018). Similar images appear in the commercials advertising children's foods and toys. For instance, researchers recently examined the ways that boys and girls are portrayed in children's programming on three networks: the Disney Channel, Cartoon Network, and Nickelodeon (Hentges & Case, 2013). Boy characters outnumbered girls three to two, and there was some evidence that characters were depicted behaving in stereotypical ways, where boys were more likely to be aggressive "rescuers" and girls were more likely to show affection.

# How Do Children Learn to Bully? Can They Unlearn?

Parents, grandparents, teachers, religious leaders, and children's television shows from *Sesame Street* to *Thomas and Friends* to *SpongeBob Squarepants* teach the importance of being kind to everyone. So how is it possible that by the time students reach middle school or high school, many treat each other cruelly? Bullying is an everyday part of adolescents' life. More mild forms of bullying include teasing or rudely excluding a classmate from a seat at the cafeteria lunch table. In its more extreme forms, physical threats and cyberbullying—or taunting and humiliating peers online—have led to dire outcomes, with dozens of bullied teens committing suicide in recent decades, including 12-year-old Florida middle-school student Rebecca Ann Sedwick who jumped from a concrete silo tower to her death. In 2018, fully 58 percent of teens said they were the target of cyberbullying, which encompassed name-calling, spreading false rumors, sexting, and physical threats (Anderson, 2018). Rates of bullying are even higher for students who do not identify as heterosexual (Schneider et al., 2012). A 2015 study found that nearly 60 percent of LGBTQ+ students reported feeling physically unsafe at school (Kosciw et al., 2016).

What accounts for the widespread cruelty to which teens subject one another, despite having been taught in elementary school to treat one another with kindness? Peers learn to bully in much the same way that they learn other positive and negative behaviors—through imitation and reinforcement. *Imitation* refers to the mimicking of the behaviors of others, especially those who hold social power, such as popular students or clique leaders. *Reinforcement* refers to the process whereby we learn to perform behaviors that are rewarded and avoid behaviors that are punished. Multiple studies show that the most popular students tend to be the perpetrators of abuse, whereas students who are less popular or emotionally insecure tend to be victims (Cook et al., 2010). Students may want to imitate the popular students they look up to and may join in on the bullying out of fear that refusing to do so may render them susceptible to abuse and isolation (Forsberg et al., 2014).

Part of the reason bullying tends to spike in early adolescence is that it's the time when children most strongly identify with their peers (Gavin & Furman, 1989). Between the ages of 10 and 14, children show deficiencies in their ability to resist peer influence (Steinberg & Monahan, 2007). Both this increased identification with their peers and an inability to resist peer influence (perhaps out of fear of being

victimized oneself) make adolescence a time when peers are particularly influential on children (Rubin et al., 2006).

Yet just as popular students often are the ones whose bad behavior is modeled by others, their good behavior also can be modeled. For this reason, researchers now suggest that bullying-prevention programs in schools must not merely involve teachers and principals, but also enlist popular students as allies. One recent study of 56 New Jersey middle schools found that when the most influential students—known as "social referents" or "social influencers"—played a leadership role in anti-bullying campaigns, more students in the school reported anti-bullying attitudes, levels of bullying dropped, and more students did things to raise awareness of bullying, like purchasing yellow bracelets to publicly display their opposition to cruel behavior in their schools (Paluck et al., 2016). As one of the researchers explained, "We think the best way to change social norms is to have these student influencers speak in their own voices. Encouraging their own messages to bubble up from the bottom using a grassroots approach can be very powerful." This research provides compelling evidence that peers can play an important role in the socialization process by modeling pro-social as well as antisocial behavior.

A recent study found that middle schools that enlisted influential students in anti-bullying campaigns experienced a 30 percent decrease in reports of student conflict.

Sociological research on socialization reveals the complex ways that individuals continue to learn the norms, values, behaviors, and social practices of the particular (and often overlapping) subgroups to which they belong over the life course. As we learned in this chapter's opening, the lessons and values passed down from generation to generation can shift dramatically over time, reflecting historical shifts in the social and economic opportunities that young people face and the roles that they will someday occupy. Gender and race socialization are two subtypes of socialization that change dramatically over time, as gender and race are socially constructed and their meanings and experiences change across time and place. As we will see in Chapters 10 (Gender Inequality) and 11 (Race, Ethnicity, and Racism), systems of gender and racial inequality have changed dramatically over the past century and will continue to do so into the future. These changes will continue to reshape the ways that gender and racial socialization processes unfold for future cohorts of young people.

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**CONCEPT CHECKS**

1. **How does the media contribute to gender role socialization?**
2. **How do parents and other adults reinforce gender roles?**
3. **Why are adolescents more likely than young children to bully their peers?**
4. **How might school systems effectively combat bullying?**

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# Glossary

gender role socialization
: The learning of gender roles through social factors such as schooling, the media, and family.

gender roles
: Social roles assigned to each sex and labeled as masculine or feminine.

# THE BIG PICTURE

# Chapter 4

## Socialization and the Life Course

**Exercises:** Thinking Sociologically

1. Concisely review how an individual becomes a social person according to the three leading theorists discussed in this chapter: G. H. Mead, Jean Piaget, and Sigmund Freud. Which theory seems most appropriate and correct to you? Explain why.
2. Consuming alcoholic beverages is one of many things we do as a result of socialization. Suggest how the family, peers, schools, and mass media help establish the desire to consume alcoholic drinks. Of these influences, which force is the most persuasive? Explain.

# BASIC CONCEPTS p. 102

## Learning Objectives

Understand how the four main agents of socialization contribute to social reproduction. Learn the stages of the life course, and see the similarities and differences between cultures.

## Terms to Know

socialization • life course • social reproduction • agents of socialization • resocialization • desocialization • anticipatory socialization • hidden curriculum • peer group • age-grade • mass media • social roles • identity • social identity • master status • self-identity

## Concept Checks

1. What is social reproduction? What are some specific ways that the four main agents of socialization contribute to social reproduction?
2. Compare and contrast social roles and social identities.
3. What are the five stages of the life course, and what are some of the defining features of each stage?
4. Describe how the life course stage of childhood has changed since medieval times.
5. How is midlife different from the life course stages of childhood and old age?

# THEORIES OF SOCIALIZATION p. 116

## Learning Objectives

Compare and contrast the theories of child development according to Mead, Cooley, Piaget, Freud, and Chodorow.

## Terms to Know

cognition • social self • self-consciousness • generalized other • looking-glass self • sensorimotor stage • preoperational stage • egocentric • concrete operational stage • formal operational stage

## Concept Checks

1. According to Mead, how does a child develop a social self? How is this view similar to, and different from, Cooley's perspective?
2. What are the four stages of cognitive development, according to Piaget?
3. How do Chodorow's and Gilligan's theories help us understand the influence of socialization on gender?
4. Name one feminist critique of Chodorow.

# RESEARCH ON SOCIALIZATION TODAY: RACE SOCIALIZATION p. 123

## Learning Objectives

Learn how recent research reveals the ways that parents teach children about the meaning of racial identity.

## Terms to Know

race socialization

## Concept Checks

1. What are the key lessons learned through the process of racial socialization?
2. Why is race socialization important in contemporary society?

# UNANSWERED QUESTIONS p. 126

## Learning Objectives

Consider the influence of social factors, especially mass media and social media, on gender learning. Analyze a new approach to combating bullying.

## Terms to Know

gender role socialization • gender roles

## Concept Checks

1. How does the media contribute to gender role socialization?
2. How do parents and other adults reinforce gender roles?
3. Why are adolescents more likely than young children to bully their peers?
4. How might school systems effectively combat bullying?

# Glossary

socialization
: The social processes through which children develop an awareness of social norms and values and achieve a distinct sense of self. Although socialization processes are particularly significant in infancy and childhood, they continue to some degree throughout life. No individuals are immune from the reactions of others around them, which influence their behavior at all phases of the life course.

life course
: The various transitions and stages people experience during their lives.

social reproduction
: The process of perpetuating values, norms, and social practices through socialization, which leads to structural continuity over time.

agents of socialization
: Groups or social contexts within which processes of socialization take place.

resocialization
: The process whereby people learn new rules and norms upon entering a new social world.

desocialization
: The process whereby people unlearn rules and norms upon exiting a particular social world.

anticipatory socialization

The process whereby we learn about a social role in advance of enacting the role.

hidden curriculum

Traits of behavior or attitudes that are learned at school but not included in the formal curriculum—for example, gender differences.

peer group

A group composed of individuals of similar age and social status.

age-grade

The system found in small traditional cultures by which people belonging to a similar age group are categorized together and hold similar rights and obligations.

mass media

Forms of communication, such as newspapers, magazines, radio, and television, designed to reach mass audiences.

social roles

Socially defined expectations of an individual in a given status or social position.

identity

The distinctive characteristics of a person's (or a group's) character that relate to who they are and what is meaningful to them. Some of the main sources of identity include gender, sexual orientation, nationality or ethnicity, and social class.

social identity

The characteristics that are attributed to an individual by others.

master status

A single identity or status that overpowers all the other identities one holds.

self-identity

The ongoing process of self-development and definition of our personal identity through which we formulate a unique sense of ourselves and our relationship to the world around us.

cognition

Human thought processes involving perception, reasoning, and remembering.

social self

The basis of self-consciousness in human individuals, according to the theory of G. H. Mead. The social self is the identity conferred upon an individual by the reactions of others. A person achieves self-consciousness by becoming aware of this social identity.

self-consciousness

Awareness of one's distinct social identity as a person separate from others. Human beings are not born with self-consciousness but acquire an awareness of self as a result of early socialization. The learning of language is of vital importance to the processes by which the child learns to become a self-conscious being.

generalized other

A concept developed by G. H. Mead, according to which the individual comes to understand the general values of a given group or society during the socialization process.

looking-glass self

According to Charles Horton Cooley's theory, the reactions we elicit in social situations create a mirror in which we see ourselves.

sensorimotor stage

According to Jean Piaget, a stage of human cognitive development in which a child's awareness of their environment is dominated by perception and touch.

preoperational stage

A stage of cognitive development, in Jean Piaget's theory, in which the child has advanced sufficiently to master basic modes of logical thought.

egocentric

According to Jean Piaget, the characteristic quality of a child during the early years of life. Egocentric thinking involves understanding objects and events in the environment solely in terms of one's own position.

concrete operational stage

A stage of cognitive development, as formulated by Jean Piaget, in which the child's thinking is based primarily on physical perception of the world. In this phase, the child is not yet capable of dealing with abstract concepts or hypothetical situations.

formal operational stage

According to Jean Piaget's theory, a stage of cognitive development at which the growing child becomes capable of handling abstract concepts and hypothetical situations.

race socialization

The specific verbal and nonverbal messages that older generations transmit to younger generations regarding the meaning and significance of race.

gender role socialization

The learning of gender roles through social factors such as schooling, the media, and family.

gender roles

Social roles assigned to each sex and labeled as masculine or feminine.

# 5 Social Interaction and Everyday Life

Imagine you are in need of assistance in a crowded subway car. A person nearby who is listening to music with their AirPods will probably

1. **willingly provide you help.**
2. **begrudgingly provide you help.**
3. **react angrily to your request for help.**
4. **be unaware of your request for help altogether.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

## LEARNING OBJECTIVES

1. **Basic Concepts** Understand the core concepts of the "impression management" perspective. Recognize how we use impression management techniques in everyday life.
2. **Theories of Social Interaction** Understand why the study of social interaction is of major importance in sociology. Learn the four zones of personal space. Learn what ethnomethodology is.
3. **Contemporary Research on Social Interaction** Understand how social interaction and broader features of society are closely related.
4. **Unanswered Questions** Consider how face-to-face interactions remain important in the age of the internet.

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Does the use of AirPods affect public social conduct? This is the question asked by Christine Miranda, a junior at Princeton University who wanted to know how receptive AirPod users were to strangers. Comparing the behavior of individuals using AirPods with those not using them, she embarked on a study in New York's subway system and began to document interactions between AirPod users and nonusers on the 6 train on the East Side of Manhattan.

You might expect that AirPod users on the subway would be unwilling or unhappy to speak with you (answers *b*, *c*, and *d*). Given that someone listening to music via headphones is preoccupied with another task, you would probably be wary about approaching them. People not wearing the trademark white AirPods likely appear more open to conversation, more able to hear what you have to say.

Miranda's study put this commonsense hypothesis to the test. Boarding a subway car, she noted whether people possessed AirPods; their positioning in relation to her; and their race, sex, and approximate age. In addition to observing users' and nonusers' responses to interactions, she noted cues such as body language and facial gestures, and recorded exchanges between users and nonusers, as well as interactions involving auditory interruptions, invasions of physical space, and sexual offenses.

Sometimes Miranda simply observed naturally occurring interactions; for example, she observed the responses of users and nonusers to a panhandler petitioning for donations. At other times, she acted as the "confederate," or intruder, interrupting an AirPod user to ask about the

train's last stop. She asked similar questions of nonusers as well, seeking to determine whether AirPod users were less eager or less willing to respond.

Miranda found that AirPod users seemed just as open to providing useful information as nonusers. Thus, answer *a* is actually correct. Among the AirPod users, no one she asked seemed to mind pausing long enough to provide an answer; indeed, the users she asked seemed more courteous than the nonusers. Having offered the information requested, however, AirPod users promptly went back to listening to their devices. (Similarly, nonusers who were reading when she asked them went back to their newspapers or books, and those engaged in conversation went back to talking.)

Corroborating the popular hypothesis just detailed, most subway riders, Miranda discovered, perceived AirPod users as less approachable. So, while most users seemed happy to offer information that was requested of them, they were less likely than nonusers to be asked in the first place. Indeed, Miranda noted, "The [AirPods] present an opportunity to block off the outside environment and to reduce the likelihood of being approached, but when social conduct does occur, the user's behavior is not much different from the nonuser's."

She concluded that while the AirPods present the illusion of separation, making a user appear less approachable, this "wall can be easily broken when we simply disrupt a person's personal space with words or actions." It may initially take a bit more effort to get the attention of an AirPod user, whose senses may be somewhat dulled compared with those of a more alert nonuser. However, when a true attempt is made to get AirPod users to interact (for example, by asking a pointed question), they seem as open to interruption as the nonuser. After the interaction, however, it is generally understood that AirPod users will go about their own business without acknowledging those around them.

# 1 BASIC CONCEPTS

**Understand the core concepts of the "impression management" perspective. Recognize how we use impression management techniques in everyday life.**

When we published the first edition of this book, the study of face-to-face communication was a well-settled territory. There is reason to think, however, that social interaction over the past decade or so has undergone a major transformation. In this chapter, we will review the traditional findings of the field, but we will also ask how we must modify those findings in light of the rise of email, Twitter, TikTok, YouTube, smartphone apps, and social networking sites. We will first learn about the ways we use impression management techniques in our daily interactions. We then move on to analyze the nonverbal cues (facial expressions and bodily gestures) all of us use when interacting with one another. Finally, we focus on the ways in which our lives are structured by daily routines, paying particular attention to how we coordinate our actions across space and time.

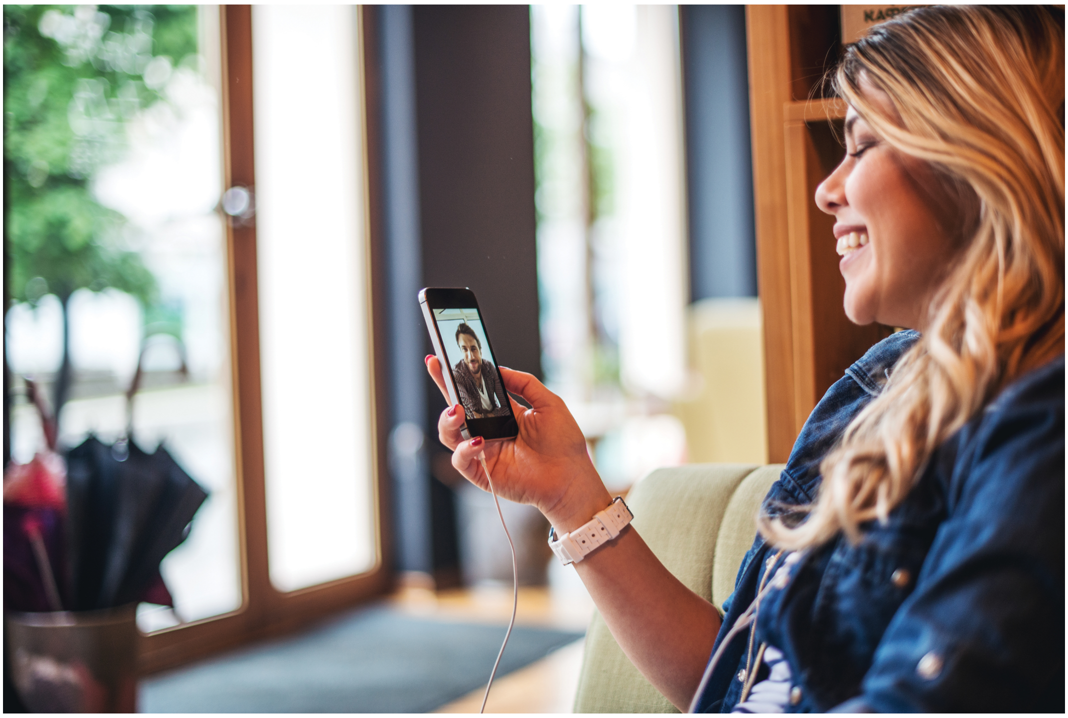
## Impression Management: The World as a Stage

Sociologist Erving Goffman and other writers on social interaction often use notions from theater in their analyses. The concept of the social role, for example, originated in a theatrical setting. Broadly speaking, roles are socially defined expectations that a person in a given status (or social position) follows. To be a teacher is to hold a specific position; the teacher's role consists of acting in specified ways toward pupils. Goffman (1973) sees social life as played out by actors on a stage (or on many stages) because how we act depends on the roles we play at a given time.

People are sensitive to how others see them and use many forms of impression management to compel others to react to them in the ways they wish them to. Although we may sometimes do this in a calculated

way, usually we do this without conscious attention. When going on a job interview, a person will typically dress more formally and try to put their best foot forward; however, when going out with friends, they might dress down, use slang, and act in ways that might not impress a prospective employer.

A central insight of social interaction based on Goffman's work is that every human being possesses a self that is fragile and vulnerable to embarrassment, or even humiliation, at every turn. People are intensely attuned to what others think of them and how others view them. That's part of the reason why we're so careful about what we post on Facebook and why we cringe if we're tagged by friends in unflattering or embarrassing photos. Seeking approval and respect, individuals want to "save face" at every turn. In social interactions, human beings tend to collaborate with others to make sure that the interaction ends without embarrassment for anyone. As a stage, social life has many players, and they must collaborate to make each scene work.



How are technologies such as smartphones, video conferencing, and social media transforming the ways we interact with one another?

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Think of examples from your own life of times when people did not collaborate with you. If you go to a club and someone with whom you don't want to talk approaches you, you will likely try to end the

interaction in a way that spares the other person embarrassment. If you were simply to tell the person, "Get lost!" rather than help them save face, that would be highly unusual. This is because there is a norm of collaboration by which human beings try to move through life without embarrassing or humiliating others. When this collaboration does not occur, the interaction stands out.

The pose that we adopt depends a great deal on our social role, but no particular role dictates any specific presentation of self. A person's demeanor can be different depending on the social context. For instance, as a student, you have a certain status and are expected to act a certain way when you are around your professors. Some pupils will enact the self-presentation of the dutiful student, while others will assume an uncaring or apathetic pose. Some sociological studies suggest that in poor inner-city schools whose student bodies comprise largely minorities, students afraid of being accused of "acting White" will adopt a personal style that is more "street" than studious. However, this appearance may not give an accurate sense of how capable a student really is. A student who takes on the demeanor of the street may be studying just as hard as classmates who take on the demeanor of the mild-mannered scholar.

## Adopting Roles

For an example of collaboration in impression management that also borrows from the theater, let's look at one particular study in some detail. James Henslin and Mae Biggs (1971, 1997) studied a specific, highly delicate type of encounter: a woman's visit to a gynecologist. At the time of the study, male doctors carried out most pelvic examinations; hence the experience was (and sometimes still is) fraught with potential ambiguities and embarrassment for both parties. Men and women in the West are socialized to think of the genitals as the most private part of the body, and seeing, and particularly touching, the genitals of another person is ordinarily associated with intimate sexual encounters. Some women feel so worried by the prospect of a pelvic examination that they refuse to visit the doctor, male or female, even when they suspect there is a strong medical reason to do so.

Henslin and Biggs analyzed material collected by Biggs, a trained nurse, from a large number of gynecological examinations. They interpreted what they found as occurring in several typical stages. Adopting a

dramaturgical metaphor, they suggested that each phase could be treated as a distinct scene, in which the parts the actors play alter as the episode unfolds. In the prologue, the woman enters the waiting room preparing to assume the role of patient and temporarily discarding her outside identity. Called into the consulting room, she adopts the “patient” role, and the first scene opens. A male doctor assumes a businesslike, professional manner and treats the patient as a proper and competent person, maintaining eye contact and listening politely to what she has to say. If the doctor decides an examination is called for, he tells her so and leaves the room. Scene One is over.

As the doctor leaves, a female nurse comes in. She is an important stagehand in the main scene shortly to begin. She soothes any worries the patient might have, acting as both a confidante—knowing some of the “things women have to put up with”—and a collaborator in what is to follow. Crucial to the next scene, the nurse helps alter the patient from a person to a “nonperson” for the vital scene—which features a body, part of which is to be scrutinized, rather than a complete human being. In Henslin and Biggs’s study, the nurse supervises the patient’s undressing, taking the patient’s clothes and folding them. Most women want their underwear to be out of sight when the doctor returns, so the nurse makes sure that this is so. She guides the patient to the examining table and covers most of the patient’s body with a sheet before the physician returns.

The central scene now opens, with the nurse as well as the doctor taking part. The presence of the nurse helps ensure that the interaction between the doctor and the patient is free of sexual overtones and provides a legal witness should the physician be charged with unprofessional conduct. The examination proceeds as though the patient’s personality were absent; the sheet across her separates the genital area from the rest of her body, and her position does not allow her to watch the examination itself. Save for any specific medical queries, the doctor ignores her, sitting on a low stool out of her line of vision. The patient collaborates in becoming a temporary nonperson, not initiating conversation and keeping any movements to a minimum.

In the interval between this scene and the final one, the nurse again plays the role of stagehand, helping the patient become a full person once more. After the doctor has left the room, the two may again engage in conversation, the patient expressing relief that the examination is over.

Having dressed and groomed herself, the patient is ready to face the concluding scene. The doctor reenters and, in discussing the results of the examination, again treats the patient as a complete person. Resuming his polite, professional manner, he conveys that his reactions to her are in no way altered by the intimate contact with her body. The epilogue is played out when the patient leaves the physician's office, resuming her identity in the outside world. The patient and the doctor have thus collaborated in such a way as to manage the interaction and the impression each participant forms of the other.

# Audience Segregation and Sticky Reputations

Although people cooperate to help one another "save face," they also endeavor individually to preserve their own dignity, autonomy, and respect. One of the ways in which people do this is by arranging for "audience segregation" in their lives. In each of their roles, they act somewhat differently, and they try to keep what they do in each role distinct from what they do in their other roles. This means that they can have multiple selves. Frequently, these selves are consistent with one another, but sometimes, they are not. People find it very stressful when boundaries break down or when they cannot reconcile their role in one area of their life with their role in another.

For example, we may have two friends who do not like each other. Rather than choose between them, we will spend time with both friends but never mention to either friend that we are close with the other. Or some people live very different lives at home and at work. For example, due to discrimination against sexual minorities, someone who appears "straight" at work may live happily with a same-sex partner at home. Like all people who engage in audience segregation, they show a different face to different people.

Audience segregation implicitly encourages impression management. Some people maintain two different Facebook or WeChat pages, one linked to family members or coworkers and another linked to friends and peers. Why might someone do this? Our Facebook pages are a strategy to "impression manage," or to carefully and selectively portray an image of ourselves to the outside world. On your "professional" page, you might

try to convey an image of a respectable student and employee by carefully curating the information and images you post. By contrast, on your personal page, you might post photos that present a more fun and carefree version of yourself.

Goffman saw social life as a precarious balancing act, but he also studied instances in which audience segregation could not be maintained. He conducted an ethnographic study of St. Elizabeth's, a mental hospital in Washington, D.C., described in his book *Asylums* (1961). St. Elizabeth's was a place where the barriers among different spheres of life (sleep, play, and work) did not exist. In such an environment, which Goffman called a "total institution," human beings need to adapt to the fact that their private spheres are limited. Other examples of "total institutions," in which all aspects of life are conducted in the same place, include prisons, monasteries, and army boot camps.

Drill artists Lil Bibby and G Herbo perform in Chicago in 2016.

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For an example of "audience segregation" that also borrows from the theater, let's look at one particular recent study of online infamy. Throughout the world today, youth are using social media platforms to

get praise and feel special, as well as to make money. The sociologist Forrest Stuart (2020) spent three years following a group of young Black men in Chicago's poorest communities who make "drill music," a genre of hip-hop that started in Chicago around 2010. Drill music capitalizes on the desire of many people inside and outside impoverished neighborhoods to see images of urban violence, gangs, and gritty streets. Drill music bears some similarity to gangsta rap, but its most famous practitioners have tended to be teenagers who sing at a slower speed with simpler lyrics that reflect and at times glorify the reality of anger, violence, and gangs on the street.

Some of the boys who create drill music do so not only to make money but also to gain recognition. This can lead to sexual encounters (a significant motive expressed by some), but it can also lead to violence and even the loss of life. Stuart presents numerous examples of young men who get so deeply involved in violence that they feel the only way to avoid injury is to finally exit the life completely. But he finds that once performers' videos are posted on the internet, they develop "sticky reputations" because the videos are difficult to remove and become "permanent archives" (Stuart, 2020). In other words, it becomes difficult for them to change their life circumstances by simply hanging out with new people or moving.

For example, after one boy named Junior got shot over an online drill video, his mother decided to move the family from the South Side of Chicago to the North Side of Chicago. Just as the family thought they were getting a new start, they climbed out of the U-Haul truck in front of their new house and starting unpacking. A group of men sitting on a nearby stoop approached Junior, called him by name, and flashed a rival gang symbol indicating he was not welcome in this neighborhood. In a previous era, Junior might have been able to move beyond his reputation by segregating his old audience and his new audience, but with videos spreading widely on YouTube, it was now impossible for Junior to do so.

# Civil Inattention

When passersby—either strangers or intimates—quickly glance at each other and then look away again, they demonstrate what Goffman (1967, 1971) calls civil inattention. Civil inattention is not the same as merely

ignoring another person. Each individual indicates recognition of the other person's presence but avoids any gesture that might be taken as too intrusive. Can you think of examples of civil inattention in your own life? Perhaps when you are walking down the hall of a dormitory, trying to decide where to sit in the dining hall, or simply walking across campus? Civil inattention to others is something we engage in more or less unconsciously, but it is of fundamental importance to the existence of social life, which must proceed efficiently, and sometimes among total strangers, without fear. When civil inattention occurs among passing strangers, an individual implies to another person that she has no reason to suspect his intentions, be hostile to him, or in any other way specifically avoid him.

The best way to see the importance of this process is by thinking of examples when it doesn't apply. When a person stares fixedly at another, allowing her face to openly express a particular emotion, it is frequently with a lover, family member, or close friend. Strangers or chance acquaintances, whether encountered on the street, at work, or at a party, virtually never hold the gaze of another in this way. To do so may be taken as an indication of hostile intent. It is only when two groups are strongly antagonistic to one another that strangers might indulge in such a practice. Even friends in close conversation need to be careful about how they look at one another. Each individual demonstrates attention and involvement in the conversation by regularly looking at the eyes of the other but not staring into them. To look too intently might be taken as a sign of mistrust about, or at least failure to understand, what the other is saying. Yet if each party does not engage the eyes of the other at all, each is likely to be thought evasive, shifty, or otherwise odd.

# Nonverbal Communication

Social interaction requires numerous forms of nonverbal communication—the exchange of information and meaning through facial expressions, gestures, and body movements. Nonverbal communication, sometimes called *body language*, often alters or expands on what is said with words. In some cases, our body language may convey a message that is at odds with our words.

## Face, Gestures, and Emotion

One major aspect of communication is the facial expression of emotion. Paul Ekman and his colleagues have developed what they call the Facial Action Coding System (FACS) for describing movements of the facial muscles that give rise to particular expressions (Ekman & Friesen, 1978). By this means, they have tried to inject some precision into an area notoriously open to inconsistent or contradictory interpretations—for there is little agreement about how emotions are to be identified and classified. Charles Darwin, one of the originators of evolutionary theory, claimed that basic modes of emotional expression are the same in all human beings. Although some have disputed the claim, Ekman's research among people from widely different cultural backgrounds seems to confirm Darwin's view. Ekman and W. V. Friesen carried out a study of an isolated community in New Guinea whose members had previously had virtually no contact with outsiders. When they were shown pictures of facial expressions conveying six emotions (happiness, sadness, anger, disgust, fear, and surprise), the New Guineans were able to identify these emotions.

Paul Ekman's photographs of facial expressions from a tribesman in an isolated community in New Guinea helped test the idea that basic modes of emotional expression are the same among all people. Here the instructions were to show how your face would look if (clockwise from top left) your friend had come and you were happy; your child had died; you saw a dead pig that had been lying there a long time; or you were angry and about to fight.

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According to Ekman, the results of his own and similar studies of different peoples support the view that the facial expression of emotion and its interpretation are innate in human beings. He acknowledges that his evidence does not conclusively demonstrate this view, and it may be that widely shared cultural-learning experiences are involved; however, his conclusions are supported by other types of research. Irenäus Eibl-Eibesfeldt (1972) studied six children born deaf and blind to see to what extent their facial expressions were the same as those of sighted and

hearing individuals in particular emotional situations. He found that the children smiled when engaged in obviously pleasurable activities, raised their eyebrows in surprise when sniffing at an object with an unaccustomed smell, and frowned when repeatedly offered a disliked object. Because the children could not have seen other people behaving in these ways, it seems that these responses must be innately determined.

Using the FACS, Ekman and Friesen identified a number of the discrete facial-muscle actions in newborn infants that are also found in adult expressions of emotion. Infants seem, for example, to produce facial expressions similar to the adult expression of disgust (pursing the lips and frowning) in response to sour tastes. But although the facial expression of emotion seems to be partly innate, individual and cultural factors influence what exact form facial movements take and the contexts in which they are deemed appropriate. How people smile—for example, the precise movement of the lips and other facial muscles—and for how long both vary among cultures.

No gestures or bodily postures have been shown to characterize all, or even most, cultures. In some societies, for instance, people nod when they mean no, the opposite of Anglo-American practice. Gestures that Americans tend to use a great deal, such as pointing, seem not to exist among certain peoples (Bull, 1983). Similarly, a straightened forefinger placed in the center of the cheek and rotated is used in parts of Italy as a gesture of praise but appears to be unknown elsewhere.

Like facial expressions, gestures and bodily posture are continually used to fill out utterances and convey meanings when nothing is actually said. All three can be used to joke, show irony, or express skepticism. The nonverbal impressions that we convey often inadvertently indicate that what we say is not quite what we actually mean. Blushing is perhaps the most obvious example, but innumerable other subtle indicators can be picked up by other people. Genuine facial expressions tend to evaporate after four or five seconds. A smile that lasts longer could indicate deceit. An expression of surprise that lasts too long may indicate deliberate sarcasm—to show that the individual is not, in fact, surprised after all.

On the internet, it is very difficult to capture dimensions of emotion that are present only with facial expression. At first, the need that internet users felt to approximate facial gestures resulted in at least two common faces:

:) or :-)

As time passed, a need for greater subtlety resulted in other widely understood variations, such as this winking smiley face:

;-)

Hand gestures are one form of nonverbal communication. Unlike facial expressions, hand gestures vary widely by culture.

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Email may once have been devoid of facial expression, but today the average email user expects to insert different emotions into a message. Strongly felt sentiments might be typed in all capitals, a gesture that is considered "shouting." The strong need that human beings feel to communicate with their faces has also led to other innovations, like FaceTime and Zoom. But, in general, people who communicate over the internet or even the phone lack the benefit of seeing the faces of their conversational partners as they speak.

Why and how does this lack of face-to-face contact matter for human relationships and interactions? On the phone, whether it's a cell phone or landline, an individual will frequently talk for a longer stretch of time than they would in face-to-face conversation. Unable to see the face of a conversational partner, the speaker can't as readily adjust what they are saying in response to clues from the listener that they "get it." Yet the phone maintains at least some immediacy of feedback that email and text messages, to a certain extent, lack. This is why in email disputes, people who are unable to make mutual adjustments in response to verbal or facial cues will end up saying much more—communicated in the form of long messages—than they would need to say in spoken conversation.

Which is best? Would you prefer to make your point via email or text message, over the phone or Zoom, or in person? Using sociological insights such as these might make you prefer electronic communication at some times and face-to-face communication at others. For example, if you are dealing with a powerful person and want to get your thoughts across, you may want to avoid a situation where the person can signal with facial gestures that your idea is silly and thus intimidate you, inhibiting you from making all your points. The power to signal with facial gestures is one of the things people use to control the flow of a conversation. On the other hand, face-to-face communication gives you an opportunity to try out an idea on someone more powerful than you without going too far down the road if the person is unreceptive.

# Response Cries

Certain kinds of utterances are not talk but consist of muttered exclamations, or what Goffman (1981) has called response cries. Consider Lucy, who exclaims, “Oops!” after knocking over a glass of water. “Oops!” seems to be merely an uninteresting reflex response to a mishap, rather like blinking your eye when a person moves a hand sharply toward your face. It is not a reflex, however, as shown by the fact that people do not usually make the exclamation when alone. “Oops!” is normally directed toward others present. The exclamation demonstrates to witnesses that the lapse is only minor and momentary, not something that should cast doubt on Lucy’s command of her actions.

Phrases like “Oops!” or “My bad!” are used only in situations of minor failure, rather than in major accidents or calamities—which also demonstrates that the exclamation is part of our controlled management of the details of social life. Moreover, these phrases may be used by someone observing Lucy rather than by Lucy herself, or they may be used to sound a warning to another. *Oops* is normally a short sound, but the *oo* may be prolonged in some situations. Thus, someone might extend the sound to cover a critical moment in performing a task. For instance, a parent may utter an extended “Oops!” or “Oops-a-daisy!” when playfully tossing a child in the air. The sound covers the brief phase when the child may feel a loss of control, reassuring him and probably at the same time developing his understanding of response cries.

This may all sound very contrived and exaggerated. Why bother to analyze such an inconsequential utterance in such detail? Surely we don’t pay as much attention to what we say as this example suggests? Of course we don’t—on a conscious level. The crucial point, however, is that we take for granted the immensely complicated, continuous control of our appearance and actions. In situations of interaction, we are never expected simply to be present. Others expect, as we expect of them, that we will display what Goffman calls “controlled alertness.” A fundamental part of being human is continually demonstrating to others our competence in the routines of daily life.

# Focused and Unfocused Interaction

In many social situations, we engage in what Goffman calls unfocused interaction with others. Unfocused interaction takes place whenever

individuals exhibit awareness of one another's presence. This is usually the case anywhere large numbers of people are assembled, as on a busy street, in a theater crowd, or at a party. When people are in the presence of others, even if they do not directly talk to them, they continually communicate nonverbally through their posture and facial and physical gestures.

Focused interaction occurs when individuals directly attend to what others say or do. Goffman calls an instance of focused interaction an encounter. Much of our day-to-day life consists of encounters with other people—family, friends, colleagues—frequently occurring against the background of unfocused interaction with others. Small talk, seminar discussions, games, and routine face-to-face contact (with ticket clerks, waiters, shop assistants, and so forth) are all examples of encounters.

Encounters always need "openings," which indicate that civil inattention is being discarded. When strangers meet and begin to talk at a party, the moment of ceasing civil inattention is always risky because misunderstandings can easily occur about the nature of the encounter being established (Goffman, 1971). Hence, making eye contact may first be ambiguous and tentative. A person can then act as though they had made no direct move if the overture is not accepted. In focused interaction, each person communicates as much by facial expression and gesture as by the words actually exchanged.

Goffman distinguishes between the expressions individuals "give" and those they "give off." The first are the words and facial expressions people use to make certain impressions on others. The second are the cues that others may spot to check a person's sincerity or truthfulness. For instance, a restaurant owner listens with a polite smile to the statements of customers about how much they are enjoying their meal. At the same time, he is noting how pleased they seemed to be while eating the food, whether a lot is left over, and the tone of voice they use to express their satisfaction.

Think about how Goffman's concepts of focused and unfocused interaction, developed mainly to explain face-to-face social encounters, apply to the current age. Can you think of a way in which unfocused interaction occurs on Instagram or Twitter? In some of these online communities, anyone can have an awareness of who else is online without being in direct contact with them. On Twitter, people are

constantly broadcasting status updates about what they are doing at that moment. These status updates make it possible for people in unfocused interaction to have even more control over how they are perceived than people who are merely in one another's presence. Instead of unconsciously revealing their facial expressions or posture as they would in face-to-face encounters, people can consciously craft the message or tweet they wish to broadcast.

# Social Life and the Ordering of Space and Time

## Interaction in Time and Space

Understanding how activities are distributed in time and space was once considered fundamental to analyzing encounters and understanding social life in general. All interaction is situated—it occurs in a particular place and has a specific duration in time. When we first wrote this textbook, we made a point that many people would question today:

> Our actions over the course of a day tend to be "zoned" in time as well as in space. Thus, for example, most people spend a zone—say, from 9:00 A.M. to 5:00 P.M.—of their daily time working. Their weekly time is also zoned: They are likely to work on weekdays and spend weekends at home, altering the pattern of their activities on the weekend days. As they move through the temporal zones of the day, they often are also moving across space; to get to work, they may take a bus from one area of a city to another or perhaps commute from the suburbs. When we analyze the contexts of social interaction, therefore, it is often useful to look at people's movements across time-space.

How does such an analysis strike a sociologist in the twenty-first century?

Digital technologies make it possible for us to interact with people we never see or meet, in any corner of the world. Such technological change rearranges space—we can interact with anyone without moving from our chair. It also alters our experience of time, because electronic

communication is almost immediate. Until about 50 years ago, most communication across space required a duration of time. If you sent a letter to someone abroad, there was a time gap while the letter was carried by ship, train, truck, or plane to the person to whom it was written. Even now, a letter mailed within the same city can take a few days to arrive.

People still write letters by hand today, of course, but instantaneous communication has become basic to our social world. Our lives would be almost unimaginable without it. We are so used to being able to switch on the TV and watch the news, make a phone call, or email a friend in another state or country that it is hard for us to imagine what life would be like otherwise.

Recent studies have suggested a reorganization of the way time is experienced under the influence of digital technologies. The British sociologist Judy Wajcman (2016) has argued that we live today under conditions of temporal density. Rather than social life being restricted to particular times and places, activities have been reallocated with an expectation that people will "multitask" and conduct the same activity in multiple places. There are many fewer parts of any day when people have just one thing to do or one particular place to do it.

Consider another concept that might soon be cast aside or reconsidered: Regionalization was once very useful in understanding how social life is zoned in time-space. Take the example of a private home. A modern house is regionalized into rooms, hallways, and floors (if there is more than one story). Not only are these spaces physically separate areas, but they were once clearly zoned in time as well. The living room and kitchen were used mostly in the daylight hours; the bedrooms, at night. The interaction that occurred in these regions was bound by both spatial and temporal divisions. Today, it is very common for all areas of the house to be work spaces, used for purposes other than those for which they were designed.

One concept that is still very useful is the division of the house into back regions and front regions, an idea beautifully captured by Goffman (1973):

> [On] a Sunday morning, a whole household can use the wall around its domestic establishment to conceal a relaxing slovenliness in dress

and civil endeavor, extending to all rooms the informality that is usually restricted to kitchen and bedrooms. So, too, in American middle-class neighborhoods, on afternoons the line between children's playground and home may be defined as backstage by mothers, who pass along it wearing jeans, loafers, and a minimum of make-up.

## Clock Time

In modern societies, the zoning of our activities is strongly influenced by clock time. Without clocks and the precise timing of activities, and thereby their coordination across space, industrialized societies could not exist (Mumford, 1973). Today, the measuring of time by clocks is standardized across the globe, making possible the complex international transport systems and communications we now depend on. World standard time was first introduced in 1884 at a conference of nations held in Washington, D.C. The globe was then partitioned into 24 time zones, one hour apart, and an exact beginning of the universal day was fixed.

Fourteenth-century monasteries were the first organizations to try to schedule the activities of their residents precisely across the day and week. Today, there is virtually no group or organization that does not do so. The greater the number of people and resources involved, the more precise the scheduling must be. Eviatar Zerubavel (1979, 1982) demonstrated this concept in his study of the temporal structure of a large modern hospital. A hospital must operate on a 24-hour basis, and coordinating the staff and resources is a highly complex matter. For instance, the nurses work for one time period in ward A, another time period in ward B, and so on, and are called on to alternate between day- and night-shift work. Nurses, doctors, and other staff, plus the resources they need, must be integrated in both time and space.

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### CONCEPT CHECKS

1. **What is impression management?**
2. **Why do we segregate our audiences in daily life?**
3. **Describe several ways that individuals communicate their emotions to one another.**
4. **Compare and contrast focused and unfocused interaction.**

5. **How does time structure human life?**

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# Glossary

roles
: The expected behaviors of people occupying particular social positions. The idea of social role originally comes from the theater, referring to the parts that actors play in a stage production. In every society, individuals play a number of social roles.

status
: The social honor or prestige a particular group is accorded by other members of a society. Status groups normally display distinct styles of life—patterns of behavior that the members of a group follow. Status privilege may be positive or negative.

social position
: The social identity an individual has in a given group or society. Social positions may be general in nature (those associated with gender roles) or more specific (occupational positions).

impression management
: Preparation for the presentation of one's social role.

civil inattention
: The process whereby individuals in the same physical setting glance at each other and quickly look away to indicate awareness of each other but not intrusiveness.

nonverbal communication
: Communication between individuals based on facial expression or bodily gesture rather than on language.

response cries
: Seemingly involuntary exclamations individuals make when, for example, they are taken by surprise, drop something inadvertently, or want to express pleasure.

unfocused interaction
: Interaction occurring among people present in a particular setting but not engaged in direct face-to-face communication.

focused interaction
: Interaction between individuals engaged in a common activity or in direct conversation with one another.

encounter

A meeting between two or more people in a situation of face-to-face interaction. Our daily lives can be seen as a series of different encounters spread out across the course of the day. In modern societies, many of these encounters are with strangers rather than with people we know.

time-space

When and where events occur.

regionalization

The division of social life into different regional settings or zones.

back region

Areas apart from front-region performance, as specified by Erving Goffman, in which individuals are able to relax and behave informally.

front region

Settings of social activity in which people seek to put on a definite "performance" for others, as specified by Erving Goffman.

clock time

Time as measured by the clock, in terms of hours, minutes, and seconds, as opposed to measuring it by the rising and setting of the sun.

# 2 THEORIES OF SOCIAL INTERACTION

**Understand why the study of social interaction is of major importance in sociology. Learn the four zones of personal space. Learn what ethnomethodology is.**

## Erving Goffman

Many of the concepts we have already reviewed were developed by Erving Goffman, the sociologist who did the most to create a new field of study focused on social interaction. Goffman believed that sociologists needed to concern themselves with seemingly trivial aspects of social behavior. His work on social interaction is just one example of the broader sociological subfield called microsociology. Sociologist Harold Garfinkel conceived this term to describe a field of study that focused on individual interaction and communication within small groups. This subfield stood in stark contrast with earlier sociological work, which historically had examined large social groups and societal-level behaviors.

The study of social interaction reveals important things about human social life. Passing someone on the street and exchanging a few words with a friend seem like minor and uninteresting activities, things we do countless times a day without giving them any thought. Goffman argued that the study of such apparently insignificant forms of social interaction is of major importance in sociology and, far from being uninteresting, is one of the most absorbing of all areas of sociological investigation. There are three reasons for this view.

First, our day-to-day routines, with their almost constant interactions with others, give structure and form to what we do; we can learn a great deal about ourselves as social beings, and about social life itself, from studying them. Our lives are organized around the repetition of similar patterns of behavior from day to day, week to week, month to month, and year to year. Think of what you did yesterday, for example, and the day

before that. If they were both weekdays, in all probability, you got up at about the same time each day (an important routine in itself). You may have gone off to class fairly early in the morning, making a journey from home to school or college that you make virtually every weekday. You perhaps met some friends for lunch, returning to classes or private study in the afternoon. Later, you retraced your steps back home or to your dorm, possibly going out later in the evening with other friends.

Of course, the routines we follow from day to day are not identical, and our patterns of activity on weekends usually contrast with those on weekdays. If we make a major change in our life, such as leaving college to take a job, alterations in our daily routines are usually necessary, but then we establish a new and fairly regular set of habits again.

Cultural norms frequently dictate the acceptable boundaries of personal space. In the Middle East, people frequently stand closer to each other than is common in the West.

Second, the study of everyday life reveals to us how humans can act creatively to shape reality. Although social behavior is guided to some extent by forces such as roles, norms, and shared expectations, individuals also have agency, or the ability to act, think, and make choices independently (Emirbayer & Mische, 1998). The ways that people perceive reality may vary widely based on their backgrounds, interests, and motivations. Because individuals are capable of creative action, they continuously shape reality through their decisions and actions. In other words, reality is not fixed or static—it is created through human interactions.

Third, studying social interaction in everyday life sheds light on larger social systems and institutions. All large-scale social systems, in fact, depend on the patterns of social interaction we engage in daily. This idea is easy to demonstrate. Consider the case of two strangers passing on the street. Such an event may seem to have little direct relevance to large-scale, more permanent forms of social organization. But when we take into account many such interactions, they are no longer irrelevant. In modern societies, most people live in towns and cities and constantly interact with others whom they do not know personally. Civil inattention, a concept discussed earlier, is one of the mechanisms that gives public life—with its bustling crowds and fleeting, impersonal contacts—its distinctive character.

# Edward T. Hall—Personal Space

There are cultural differences in the definition of personal space. In Western culture, people usually maintain a distance of at least three feet when engaged in focused interaction with others; when standing side by side, they may stand closer together. In the Middle East, people often stand closer to each other than is thought acceptable in the West. Westerners visiting that part of the world are likely to find themselves disconcerted by this unexpected physical proximity.

Edward T. Hall (1969, 1973), who worked extensively on nonverbal communication, distinguishes four zones of personal space. Intimate distance, of up to one and a half feet, is reserved for very few social contacts. Only those involved in relationships in which regular bodily touching is permitted, such as lovers or parents and children, operate

within this zone of private space. Personal distance, from one and a half to four feet, is the normal spacing for encounters with friends and close acquaintances. Some intimacy of contact is permitted, but this tends to be strictly limited. Social distance, from 4 to 12 feet, is the zone usually maintained in formal settings such as interviews. The fourth zone is that of public distance, beyond 12 feet, preserved by those who are performing to an audience.

**Table 5.1 APPLYING SOCIOLOGY TO SOCIAL INTERACTION**

| CONCEPT | APPROACH TO SOCIAL INTERACTION | CONTEMPORARY APPLICATION |
|---|---|---|
| **Impression management** | People's sensitivity to the way they are perceived by others causes them to manipulate situations so that others respond to them according to how they wish to be perceived. | Students and those working from home manipulating background images on Zoom to conceal things about their surroundings that they don't wish others to see. |
| **Audience segregation** | People act differently in particular situations. | People maintaining two separate Instagram accounts—one for family, the other for coworkers or friends. |

| CONCEPT | APPROACH TO SOCIAL INTERACTION | CONTEMPORARY APPLICATION |
|---|---|---|
| **Civil inattention** | Passersby glance at each other, then look downward in order to avoid eye contact that may be interpreted as overly intrusive. | Young men on the street staring straight into each other's eyes and interpreting this gesture as a threat and goad to physical violence. |
| **Nonverbal communication** | Communication can occur via gesture or facial expression rather than through words. | Using emojis to express emotions in text messages when the sender's face is not visible to the receiving party. |
| **Response cries** | An expression is uttered by someone who has made a mistake to indicate that it should not cast doubts on their power of judgment, aptitude, or competence. | A person exclaiming "my bad" or "oops" after discovering that they have been wrong about something. |

| CONCEPT | APPROACH TO SOCIAL INTERACTION | CONTEMPORARY APPLICATION |
|---|---|---|
| **Focused and unfocused interaction** | People may pay explicit attention to what others say or do, or they may simply exhibit awareness of others' presence. | Friends getting together to talk to each other versus friends attending to their own electronic devices while in each other's company. |
| **Personal space** | A distance of one to four feet between people is deemed normal during human encounters. | People having trouble interacting with others when a six-foot social distancing rule is put into effect during the Covid-19 pandemic. |

In ordinary interaction, the most fraught zones are those of intimate and personal distance. If these zones are invaded, people try to recapture their space. We may stare at the intruder as if to say, "Move away!" or elbow them aside. When people are forced into closer proximity than they deem desirable, they might create a kind of physical boundary: A reader at a crowded library desk might physically demarcate a private space by stacking books around its edges (Hall, 1969, 1973).

# Harold Garfinkel: Ethnomethodology

Although we routinely use nonverbal cues in our own behavior and in making sense of the behavior of others, much of our interaction is done through talk—casual verbal exchange—carried on in informal conversations with others. We can make sense of what is said in conversation only if we know the social context, which does not appear

in the words themselves. Take the following conversation (Heritage, 1985):

*A: I have a fourteen-year-old son.*

*B: Well, that's all right.*

*A: I also have a dog.*

*B: Oh, I'm sorry.*

What do you think is happening here? What is the relationship between the speakers? What if you were told that this is a conversation between a prospective tenant and a landlord? The conversation then becomes sensible: Some landlords accept children but don't permit their tenants to keep pets. Yet if we don't know the social context, the responses of individual B seem to bear no relation to the statements of A. Part of the sense is in the words, and part is in the way the meaning emerges from the social context.

The most inconsequential forms of daily talk presume complicated, shared knowledge brought into play by those speaking. The words used in ordinary talk do not always have precise meanings, and we "fix" what we want to say through the unstated assumptions that back it up. If Maria asks Tom, "What did you do yesterday?" the words in the question themselves suggest no obvious answer. A day is a long time, and it would be logical for Tom to answer, "Well, at 7:16, I woke up. At 7:18, I got out of bed, went to the bathroom, and started to brush my teeth. At 7:19, I turned on the shower . . ." We understand the type of response the question calls for by knowing Maria, what sort of activities she and Tom consider relevant, and what Tom usually does on a particular day of the week, among other things.

Ethnomethodology is the study of the "ethnomethods"—folk or lay or commonsense methods—that people use to make sense of what others do and particularly of what they say. We all apply these methods, normally without giving any conscious attention to them. This field was created by Harold Garfinkel, who, along with Goffman, was one of the most important figures in the study of micro interaction.

Garfinkel argued that to understand the way people use context to make sense of the world, sociologists need to study the "background expectancies" with which we organize ordinary conversations. He highlighted these in some experiments he undertook with student volunteers (1963). The students were asked to engage a friend or relative in conversation and to insist that casual remarks or general comments be actively pursued to make their meaning precise. If someone said, "Have a nice day," the student was to respond, "Nice in what sense, exactly?" "Which part of the day do you mean?" and so forth. One of the exchanges that resulted ran as follows (S is the friend; E, the student volunteer) (Garfinkel, 1963):

*S: How are you?*

*E: How am I in regard to what? My health, my finances, my school work, my peace of mind, my . . . ?*

*S: (red in the face and suddenly out of control): Look! I was just trying to be polite. Frankly, I don't give a damn how you are.*

Why do people get so upset when apparently minor conventions of talk are not followed? The answer is that the stability and meaningfulness of our daily social lives depend on the sharing of unstated cultural assumptions about what is said and why. If we weren't able to take these for granted, meaningful communication would be impossible. Any question or contribution to a conversation would have to be followed by a massive "search procedure" of the sort Garfinkel's subjects were told to initiate, and interaction would simply break down. What seem at first sight to be unimportant conventions of talk, therefore, turn out to be fundamental to the very fabric of social life, which is why their breach is so serious.

Note that in everyday life, people on occasion deliberately feign ignorance of unstated knowledge. This may be done to rebuff others, poke fun at them, cause embarrassment, or call attention to a double meaning in what was said. Consider, for example, this classic exchange between parent and teenager:

*P: Where are you going?*

*T: Out.*

*P: What are you going to do?*

*T: Nothing.*

The responses of the teenager are effectively the opposite of those of the volunteers in Garfinkel's experiments. The teenager declines to provide appropriate answers at all—essentially saying, "Mind your own business!"

The first question might elicit a different response from another person in another context:

*A: Where are you going?*

*B: I'm going quietly round the bend.*

B deliberately misreads A's question to convey worry or frustration in an ironic manner. Comedy and joking thrive on such deliberate misunderstandings of the unstated assumptions involved in talk. There is nothing threatening about this behavior, so long as the parties concerned recognize that the intent is to provoke laughter.

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**CONCEPT CHECKS**

1. **What is microsociology?**
2. **What are three reasons it is important to study daily social interaction?**
3. **What are the four zones of personal space?**
4. **How did Garfinkel's students create tense situations?**

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# Glossary

social interaction
: The process by which we act and react to those around us.

agency
: The ability to think, act, and make choices independently.

personal space

The physical space individuals maintain between themselves and others.

ethnomethodology

The study of how people make sense of what others say and do in the course of day-to-day social interaction. Ethnomethodology is concerned with the “ethnomethods” by which people sustain meaningful interchanges with one another.

# 3 CONTEMPORARY RESEARCH ON SOCIAL INTERACTION

**Understand how social interaction and broader features of society are closely related.**

## Interactional Vandalism

Conversations are one of the main ways in which our daily lives are maintained in a stable and coherent manner. We feel most comfortable when the tacit conventions of small talk are adhered to; when they are breached, we can feel threatened, confused, and insecure. In most everyday talk, conversants are carefully attuned to the cues they get from others—such as changes in intonation, slight pauses, or gestures—to facilitate smooth conversation. By being mutually aware, conversants "cooperate" in opening and closing interactions and in taking turns to speak. Interactions in which one party is conversationally "uncooperative," however, can give rise to tensions.

Garfinkel's students created tense situations by intentionally undermining conversational rules as part of a sociological experiment. But what about situations in the real world in which people make trouble through their conversational practices? One study investigated verbal interchanges between pedestrians and street people in New York City to understand why passersby so often see such interactions as problematic. The researchers used a technique called conversation analysis to compare a selection of street interchanges with samples of everyday talk. Conversation analysis is a methodology that examines all facets of a conversation for meaning—from the smallest filler words (such as *um* and *ah*) to the precise timing of interchanges (including pauses, interruptions, and overlap).

The study looked at interactions between Black men—many of whom were homeless or addicted to drugs or alcohol—and women who passed

by them on the street. The men often tried to initiate conversations with passing women by calling out to them, paying them compliments, or asking them questions. But something "went wrong" in these conversations, because the women rarely responded as they would have in a normal interaction. Even though the men's comments were rarely hostile in tone, the women tended to quicken their step and stare fixedly ahead. The following shows attempts by Mudrick, a Black man in his late fifties, to engage women in conversation (Duneier & Molotch, 1999):

Mudrick begins this interaction when a white woman who looks about twenty-five approaches at a steady pace:

1. *Mudrick: I love you, baby.*

She crosses her arms and quickens her walk, ignoring the comment.

2. *Mudrick: Marry me.*

Next, it is two white women, also probably in their mid-twenties:

3. *Mudrick: Hi, girls, you all look very nice today. You have some money? Buy some books.*

They ignore him. Next, it is a young black woman.

4. *Mudrick: Hey, pretty. Hey, pretty.*

She keeps walking without acknowledging him.

5. *Mudrick: 'Scuse me. 'Scuse me. I know you hear me.*

Then he addresses a white woman in her thirties.

6. *Mudrick: I'm watching you. You look nice, you know.*

She ignores him.

Negotiating smooth "openings" and "closings" to conversations is a fundamental requirement for urban civility. These crucial aspects of conversation were highly problematic between the men and women in this study. When the women resisted the men's attempts at opening conversations, the men ignored the women's resistance and persisted.

Similarly, if the men succeeded in opening a conversation, they often refused to respond to cues from the women to close the conversation once it had gotten underway (Duneier & Molotch, 1999):

1. *Mudrick: Hey, pretty.*
2. *Woman: Hi, how you doin'?*
3. *Mudrick: You alright?*
4. *Mudrick: You look very nice, you know. I like how you have your hair pinned.*
5. *Mudrick: You married?*
6. *Woman: Yeah.*
7. *Mudrick: Huh?*
8. *Woman: Yeah.*
9. *Mudrick: Where the rings at?*
10. *Woman: I have it home.*
11. *Mudrick: Y' have it home?*
12. *Woman: Yeah.*
13. *Mudrick: Can I get your name?*
14. *Mudrick: My name is Mudrick. What's yours?*

She does not answer and walks on.

In this instance, Mudrick made 9 out of the 14 utterances in the interaction to initiate the conversation and to elicit further responses from the woman. From the transcript alone, it is quite evident that the woman is not interested in talking, but when conversation analysis is applied to the tape recording, her reluctance becomes even clearer. Even when she does respond, the woman delays all her responses, while Mudrick replies immediately, his comments sometimes overlapping hers. Timing in conversations is a very precise indicator; delaying a response by even a fraction of a second is adequate in most everyday interactions to signal the desire to change the course of a conversation. By betraying these tacit rules of sociability, Mudrick was practicing conversation in a way that was technically rude. The woman, in return, was also technically rude in ignoring Mudrick's repeated attempts to engage her in talk. It is the technically rude nature of these street interchanges that make them problematic for passersby to handle. When standard cues for opening and closing conversations are not adhered to, individuals feel a sense of profound and inexplicable insecurity.

The term interactional vandalism describes cases like these in which a subordinate person breaks the tacit rules of everyday interaction that are of value to the more powerful person. The men on the street often do conform to everyday forms of speech in their interactions with one another, local shopkeepers, the police, relatives, and acquaintances. But when they choose to, they subvert the tacit conventions for everyday talk in a way that leaves passersby disoriented. Even more than physical assaults or vulgar verbal abuse, interactional vandalism leaves victims unable to articulate what has happened.

This study of interactional vandalism provides another example of the two-way links between micro-level interactions and forces that operate on the macro level. To the men on the street, the women who ignore their attempts at conversation appear distant, cold, and bereft of sympathy—legitimate “targets” for such interactions. The women, meanwhile, may often take the men’s behavior as proof that they are indeed dangerous and best avoided. Interactional vandalism is closely tied up with overarching class, gender, and racial structures. The fear and anxiety generated in such mundane interactions help reinforce the outside statuses and forces that, in turn, influence the interactions themselves. Interactional vandalism is part of a self-reinforcing system of mutual suspicion and incivility.

## Interactional Vandalism Online

By approaching a woman on the street and trying to initiate a conversation, Mudrick engaged in interactional vandalism.

The internet creates spaces where less powerful people can make their superiors accountable in ways they never were before. Think of all the blogs in which workers talk anonymously about their bosses or situations in which workers forward rude messages from their boss to other employees. Because of the internet, powerful people are less able to

segregate their audiences—treating some people poorly behind the scenes and treating others very nicely in public—and get away with it.

The concept of "trolling" might be seen as an interactional mode that shares certain, though not all, aspects of interactional vandalism. A troll is a person who is anonymously disruptive of the taken-for-granted purposes of an online space such as a message board. As such, a troll might post deliberately provocative items. Such provocations might have the effect of undermining the civility that is a foundation for the kind of communication the site's founders envisioned. Or the controversies raised by trolls can sometimes increase traffic to the site.

To what extent is trolling an example of interactional vandalism of the kind found in face-to-face communication on the sidewalk? Like the poor Black men in the study discussed above who acted sincere as they pretended not to understand that a two-second pause is a signal to close a conversation, a troll will pretend not to understand certain assumptions of the conversational world for the specific purpose of being disruptive. Like the poor men on the street, the troll will communicate as if they are a sincere member of the group who perhaps does not understand certain things, while at a deeper level, they know precisely what they are doing.

Some readers of a comment posted by a troll might be lured further into the interaction, while others will attempt to restore normal order by dismissing the troll's actions. In interactional vandalism on the sidewalk, a less powerful person is subverting normal interaction to undermine the taken-for-granted control of someone in a superordinate position. In trolling, the parties are often anonymous, so it's not always possible to know what the actual power dynamics are. Are the anonymous people, in fact, less powerful members, or could they be very well-known members of the community who are using the board to further their own agenda?

# Interaction Before and After the "Digital Street"

Studies of the street provide another example of how social interaction has changed in an era of digital technologies. Classic work on social interaction in public produced in the early nineties by the sociologist Elijah Anderson shows that the manner in which many Blacks and

Whites interact on the streets of a northern city in the United States has a great deal to do with the structure of racial stereotypes, which itself is linked to the economic structure of society. In this way, he reveals the link between micro interactions and the larger macro structures of society. Anderson begins by recalling Erving Goffman's description of how social roles and statuses come into existence in particular contexts or locations:

> When an individual enters the presence of others, they commonly seek to acquire information about him or bring into play information already possessed. . . . Information about the individual helps to define the situation, enabling others to know in advance what he will expect of them and they may expect of him. (Anderson, 1990)

Following Goffman's lead, Anderson (1990) asked what types of behavioral cues and signs make up the vocabulary of public interaction. He concluded that skin color, gender, age, companions, clothing, jewelry, and the objects people carry help identify them, allowing assumptions to be formed and communication to occur. Movements (quick or slow, false or sincere, comprehensible or incomprehensible) further refine this public communication. Factors such as time of day or an activity that "explains" a person's presence can also affect how and how quickly the image of "stranger" is neutralized. If a stranger cannot pass inspection and be assessed as "safe," the image of predator may arise, and fellow pedestrians may try to maintain a distance consistent with that image.

According to Anderson, the people most likely to pass inspection are those who do not fall into commonly accepted stereotypes of dangerous persons: "Children readily pass inspection, while women and white men do so more slowly, black women, black men, and black male teenagers most slowly of all." In showing that interactional tensions derive from outside statuses such as race, class, and gender, Anderson makes clear that we cannot develop a full understanding of the situation by looking at the micro interactions themselves. This is how he makes the link between micro interactions and macro processes.

Immediate assumptions based on race, gender, class, and style of dress, among other signs and behavioral cues, affect the way strangers interact. Elijah Anderson's study of social interaction between strangers on urban streets showed a strong connection between such micro-level interactions and the creation of social order.

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Anderson argues that people are streetwise when they develop skills such as "the art of avoidance" to deal with their felt vulnerability toward violence and crime. According to Anderson, Whites who are not streetwise do not recognize the difference between different kinds of Black men (e.g., middle-class youths versus gang members). They may also not know how to alter the number of paces to walk behind a suspicious person or how to bypass bad blocks at various times of day. In these ways, social science research can help you understand how a very ordinary behavior—navigating one's way through the city streets—reveals important lessons about the nature of contemporary social interaction.

Recently, sociologists have looked at how the proliferation of smartphones and the rise of social media are changing how boys and girls interact in public spaces. For teenagers in low-income urban areas, the street has long served as a hub of social life and dating. Street interactions between boys and girls may incorporate aspects of both courtship and the incivility that characterizes street talk between adult

men and women who are strangers. Today, these encounters are reshaped online, or on what urban sociologist Jeffrey Lane refers to as the "digital street." Lane (2018) studied a cohort of teenagers in Harlem and found that boys and girls had changed the experience of public space by using social media to buffer interaction. Whereas boys were more visible and acted more dominant toward girls on the sidewalk, girls gained visibility and control online.

While for some of the boys in Lane's study, social media provided *another,* alternative way to call out to girls, other boys engaged girls digitally *instead of* on the sidewalk. Messaging girls in private, rather than approaching them face-to-face on the sidewalk, shielded boys from public rejection in front of their friends when advances went unmet. But private messages were not necessarily the best strategy. Christian, one of the teenagers in Lane's study, explained that "a girl hates" when a boy writes "a million messages, like, 'What's up, I'm trying to talk to you.'" Instead, Lane found that a girl would rather a boy like one of her photos and then leave the girl to make the next move. Social media enabled various kinds of communication at different distances and paces that steered teens either away from or toward meetings in person.

Lane argued that girls and, to a lesser extent, boys were safer with social media. But traditionally gendered norms of interaction and roles also carried forward. For instance, boys and girls alike articulated the pressure on young women to objectify their bodies online. "Girls get naked for likes," said one 18-year-old girl in Lane's research. False identity was another issue. Unlike in physical space, appearance and person may decouple online in the case of "fake pages" or "catfishes"—profiles that depict someone other than their user. The possibility of a fake page created trust issues among boys and girls, and these issues were compounded by the fact that law enforcement used profiles designed to mimic girls in the neighborhood to monitor and gather intelligence on boys of interest.

The role of social media raises new questions of how people come to find and know each other today. Do people have more understanding or even control over the people around them and their potential meetings? Or are people newly vulnerable online?

## The Cosmopolitan Canopy

Although public space can often be a site of tension and anxiety, Anderson argues in a later book, *The Cosmopolitan Canopy* (2011), that social interaction in urban spaces is not all doom and gloom. There are many places where people of different backgrounds actually get along. For Anderson, the racially and ethnically diverse spaces he has studied offer “a respite from the lingering tensions of urban life as well as an opportunity for diverse peoples to come together.” They are what he calls “pluralistic spaces where people engage with one another in a spirit of civility, or even comity and goodwill.”

Community pools are an example of what Elijah Anderson refers to as a cosmopolitan canopy, an area where diverse groups of people can come together and engage in a “spirit of civility.”

On the basis of in-depth observations of public areas in his longtime home of Philadelphia, Anderson reports on various important sites in the city. These include the Reading Terminal Market, Rittenhouse Square, and the Galleria Mall. The first two are venues dominated by middle- and

upper-middle-class norms and values, while the Galleria caters to the tastes of the Black working classes and the poor. All three sites, however, are spaces where various kinds of people meet, agree to lay down their swords, carry on their life routines, and, in many cases, enjoy themselves.

Anderson begins with an ode to Philadelphia's indoor farmers' market—the downtown Reading Terminal Market. A regular at the market for decades, he paints a loving portrait of the many types of people who congregate there, including the population of Amish vendors. The patrons range from corporate executives to construction workers to senior citizens in poor health. They are all "on their best behavior" as they eat and shop for food and other items.

What is it about this space, Anderson asks, that causes people to "show a certain civility and even an openness to strangers"? To begin, the city is divided into two kinds of human beings: the open-minded people, whom he calls "cosmos" (shorthand for cosmopolitan), and the close-minded, whom he calls "ethnos" (shorthand for ethnocentric). As Anderson sees it, Reading Terminal Market is filled with open-minded people. Through a kind of people watching, each contributes to the creation of the cosmopolitan canopy. It is literally the sight of so many kinds of people in one another's physical presence, as well as participation in what one sees, that reinforces the idea of a "neutral space." Whites and minorities who have few opportunities for such interaction elsewhere can relax and move about with security. Blacks, however, understand that their status there is always provisional, meaning that at any moment they may be subject to dramatic situations in which Whites fail to treat them with the respect they deserve.

The dynamic that Anderson highlights over and over is the self-fulfilling nature of the interaction: The interaction and the sight of it make it so. Most who come are probably repeat players, and they have long visualized different kinds of people getting along in the space. For newcomers, on the other hand, such visualization of tolerance is "infectious." In Rittenhouse Square Park and the streets surrounding it, other social cues serve to bring about similar results. There are, for example, a fountain and a statue of a goat that attract mothers, nannies, and children. The sight of "public mothering" is a cue that indicates this is a civil place. A sense of safety and protection underlies good behavior and, in turn, leads to a virtuous circle of other acts of goodwill. Dog walkers are also crucial, with interaction naturally occurring between

them and others (including children) as they form a critical mass in the park throughout the day. In a similarly positive encounter, when an elderly White woman has trouble standing up, a man sitting on a nearby bench rises and offers his hand to help. As Anderson notes, "Those of us who observed this act realized that we ourselves might expect such help or be called upon to render it."

The Galleria is a different story. Anderson describes it as the "ghetto downtown," a community of close-minded poor Blacks ("ethnos") in one mall. What makes it a canopy, albeit not a cosmopolitan one, is that various elements of the Black community—the "street" and the "decent"—can coexist here. People feel free to be themselves, "loud and boisterous and frank in their comments, released from the inhibitions they might feel among whites." The code of the street threatens to undermine the public order at any moment, but everyone is on their best behavior, with security guards reinforcing decorum. Nevertheless, Anderson stresses that through a negative feedback loop, this place has a self-reinforcing negative reputation among cosmopolitan Whites and Blacks. It arises from cues the non-White population on the streets around the mall give off and culminates in occasional deeply disturbing incidents such as the "flash mob"—high school students organized through Facebook and Twitter who suddenly appear on the downtown streets "wreaking havoc on businesses and terrifying pedestrians." Anderson continues, "As quickly as this storm appears out of the blue, it is over, but the effects are lasting, powerfully redefining the public spaces of the canopy zone" (Anderson, 2011, p. 98).

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**CONCEPT CHECKS**

1. **What is interactional vandalism?**
2. **What does Anderson mean by the term *streetwise*?**
3. **How would you explain the street harassment that women often experience?**
4. **Can you identify any examples of cosmopolitan canopies in your neighborhood?**

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# Glossary

conversation analysis

The empirical study of conversations, employing techniques drawn from ethnomethodology. Conversation analysis examines details of naturally occurring conversations to reveal the organizational principles of talk and its role in the production and reproduction of social order.

interactional vandalism

The deliberate subversion of the tacit rules of conversation.

# 4 UNANSWERED QUESTIONS

**Consider how face-to-face interactions remain important in the age of the internet.**

## How Do We Manage Impressions in the Internet Age?

The concept of "audience segregation" helps us understand some of the dilemmas of electronic communication. Many people are very sensitive about having things sent to their business email address if they don't want their coworkers or supervisors to know about them. Thus, they maintain different addresses for home (back region) and office (front region), a practice that is increasingly important because many companies have policies against sending personal email from a company's computer.

Or consider the social situation of a copied message. You write a message to a friend asking her whether she prefers to go to the early show or the late show. You also tell your friend that you have a new boyfriend whom you hope she'll like. She replies and copies the other people who are thinking of going to the movie, many of whom you never intended to tell about the new romance. Suddenly, the audience segregation you had imagined has broken down.

In recent years, undergraduate students have posted pictures of themselves drinking at parties, or even naked, only to discover that future employers conducted web searches before making hiring decisions. Some students have even found themselves expelled from their colleges for posting inappropriate photos or comments on social media. For example, in April 2017, Harvard University rescinded offers of admission to at least 10 students who circulated offensive memes within a private Facebook group for prospective Harvard students. Another example of blurring audiences is the case of sexting; a high school student may send a revealing photo of herself to her boyfriend, only to have him forward it to the entire school—whether out of cruelty or by mistake. Personal

catastrophes such as these, and ones far worse, occur frequently in the age of email and smartphones.

## What Happens When Dating Moves Online?

How did you meet your last romantic partner? Perhaps you met at a party or sat next to each other in your introduction to sociology course. Can you remember what it was that drew you to that person? Was there something subtle or unexpected that signaled to you there might be an attraction, like a tone of voice, a wink, or a light touch to the shoulder? Or did you already have a clear-cut notion of the kind of person you wanted to date—maybe someone tall, or who shared your religious background, or who had professional goals similar to your own—and you carefully surveyed those whom you saw as an "appropriate" partner, before making your move?

A social network analysis study of online dating site users found that norms of homogamy are still pervasive in the United States.

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While popular music suggests that two strangers will lock eyes across a crowded room and true love will follow, in our current digital age,

meetings often happen in a far less romantic and more strategic way. According to a recent survey of more than 4,860 Americans 18 years of age or older, 30 percent of adults have used a mobile dating app or website (Anderson et al., 2020). Dozens of smartphone apps like Tinder, Hinge, Bumble, Adventurely, and Happn allow people to search through endless photos of eligible partners and screen them, or "swipe right," based on personal preferences like education, occupation, age, height, body weight, gender, sexual orientation, and race. Usage is particularly high among young adults: Almost half (48 percent) of 18- to 29-year-olds have used a mobile dating app or website. Seventeen percent of those who meet potential partners online have entered committed relationships (Anderson et al., 2020).

Although apps may take the romance and intrigue out of dating, they do fulfill a practical function. Young people can shop for a date in exactly the same way they would shop for a new car; they can specify precisely what they want and search for potential partners who possess those traits. From a sociological perspective, many apps provide strong evidence that norms of *homogamy*, or dating and marrying a partner similar to oneself, are still pervasive in U.S. society. New studies also show that apps provide evidence of *hypergamy*, or the preference to partner with a person with richer socioeconomic resources than one's own; this tendency typically occurs for women seeking men.

For instance, sociologist Kevin Lewis (2013) analyzed data from more than 126,000 dating site users and found that users tended to show the greatest interest in those of their same ethnic background. He analyzed only the first message sent and first reply of each user. He found the strongest tendency to initiate contact within one's own race among East and South Asians and Indians and the weakest among Whites. He found that while users would respond to a message from someone from a different ethnic or racial group, this open-mindedness was relatively short-lived; most would promptly return to their old patterns of communicating only with members of their own group.

Lewis's analyses also uncovered evidence that users hold dating preferences consistent with "highly gendered status hierarchies." For instance, women tend to seek out men with more education and more income than they themselves have. Although men also sought educated partners, they tended to show greatest interest in women with a college education—"no more and no less." Racial hierarchies also emerged.

White men, Lewis found, enjoyed a privileged position, receiving the most initial messages, while Black women received the fewest.

Additionally, more than a quarter of online daters report having been contacted in a way that made them feel harassed or uncomfortable. Not surprisingly, perhaps, a significant gender difference exists here: 48 percent of women complained about this type of contact, compared with 27 percent of men (Anderson et al., 2020). It turns out that online dating interactions tend to be gendered as well. One study of nearly 15,000 men and women found that men are far more likely to initiate online exchanges than are women, an unfortunate asymmetry because women who initiate conversations have greater odds of success with equally desirable partners than women who wait to be messaged, but women are much less likely to seize the initiator advantage. In other words, by relying on men to initiate a relationship, women often forego the promise of online dating and are left wondering where all the good men have gone (Kreager et al., 2014).

The authors conclude that rather than placing men and women on an equal footing when it comes to establishing intimate partnerships, online dating actually reproduces gender inequality. Whether in a crowded bar or sheltered by the initial privacy of their mobile phones, women are less likely to make the first move, and this reluctance works to their disadvantage. The study's message to women is clear: Don't be shy. As the study notes, "Women should not be discouraged from sending messages if they want to contact attractive partners" (Kreager et al., 2014).

It remains unclear whether online dating is preferable to meeting the old-fashioned way. On the plus side, it provides access to a large number of potential partners in an initially anonymous setting, which may be of special benefit for those too shy or introverted to initiate direct face-to-face contact. The use of online questionnaires, which permit would-be partners to determine whether they are compatible before they ever meet, ideally provides a relatively safe way to winnow out poor choices. Yet the very anonymity of online dating invites deception, ranging from the unintentional (are most people accurate judges of their best personality traits?) to outright deception (lying about one's age, physical characteristics, or even marital status). One study concludes:

Deliberate deception is unlikely, however, to account for the entire difference between online and offline impression formation. Even when deception is not an issue, face-to-face interaction still conveys information that cannot be gleaned readily from CMC [computer-mediated communication]. In particular, CMC is unlikely to convey experiential attributes as effectively as face-to-face interactions. (Finkel et al., 2012)

Online dating may be efficient, easy, and increasingly common, but it has yet to prove that it's preferable to locking eyes across a crowded room.

# To What Extent Can Electronic Communication Substitute for Face-to-Face Communication?

In modern societies, we are constantly interacting with others whom we may never see or meet. Almost all our everyday transactions, such as buying groceries or making a bank deposit, bring us into contact—but indirect contact—with people who may live thousands of miles away. The banking system, for example, is international. Any money you deposit is a small part of the financial investments the bank makes worldwide.

Individuals, including world leaders, often prefer face-to-face interaction because it provides critical information not available via electronic communication.

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Some people are concerned that the rapid advances in communication technology, such as email, the internet, e-commerce, and social media, will only increase this tendency toward indirect interactions. More than two-thirds (69 percent) of all U.S. adults are on Facebook, with 7 in 10 visiting the site at least once a day (Gramlich, 2021). Among Facebook users, 39 percent say they are connected to people they have never met in person (Duggan et al., 2015). Now that email, social networking sites, and electronic discussion groups have become facts of life for many people in industrialized countries, it is important to ask, What is the nature of these interactions, and what new complexities are emerging from them?

Our society is becoming "devoiced," some claim, as the capabilities of technology grow ever greater. According to this view, as the pace of life accelerates, people are increasingly isolating themselves; we now interact more with our televisions and computers than with our neighbors or members of the community. Some researchers conclude that the substitution of email for face-to-face communication has led to a weakening of social ties and a disruption of techniques used in personal dialogue for avoiding conflict. Further, online communication seems to allow more room for misinterpretation, confusion, and abuse than more traditional forms of communication (Friedman & Currall, 2003).

Many internet enthusiasts, however, disagree. They argue that social relations continue to thrive and might even be facilitated by frequent online communication (Hampton et al., 2011; Wellman, 2008). Far from being impersonal, they argue, online communication has many inherent advantages that cannot be claimed by more traditional forms of interaction such as the telephone and face-to-face meetings. The human voice, for example, may be far superior in terms of expressing emotion and subtleties of meaning, but it can also convey information about the speaker's age, gender, ethnicity, or social position—information that could be used to the speaker's disadvantage. Electronic communication, it is noted, masks all these identifying markers and ensures that attention focuses strictly on the content of the message. This can be a great advantage for women or other traditionally disadvantaged groups whose

opinions are sometimes devalued in other settings (Locke & Pascoe, 2000). Electronic interaction is often presented as liberating and empowering because people can create their own online identities and can speak more freely than they would elsewhere.

Recent research shows that social networking may even enhance social integration and friendships (Hobbs et al., 2016). A national survey conducted by the Pew Research Center reports that teens who use social networking sites have more close relationships and receive more emotional and practical social support than those who do not use such sites (Anderson & Jiang, 2018a). For many people, online relationships are quite meaningful. Further, people can communicate with those who don't share their geographic region; perhaps you have reconnected via Facebook with childhood friends who live hundreds of miles away.

Who is right in this debate? To what extent can electronic communication substitute for face-to-face interaction? Sociologists Deirdre Boden and Harvey Molotch (1994) argue that there is no substitute for face-to-face interaction. They argue further that humans have a true need for personal interaction, which they call the "compulsion of proximity." People put themselves out to attend meetings, Boden and Molotch suggest, because situations of copresence (for reasons documented by Goffman in his studies of interaction) provide much richer information about how other people think and feel, and about their sincerity, than any form of electronic communication. Only by actually being in the presence of people who make decisions affecting us in important ways do we feel able to learn what is going on and feel confident that we can impress them with our own views and our sincerity. "Co-presence," Boden and Molotch (1994) say, "affects access to the body part that 'never lies': the eyes, the 'windows on the soul.' Eye contact itself signals a degree of intimacy and trust; co-present interactants continuously monitor the subtle movements of this most subtle body part."

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## CONCEPT CHECKS

1. **Is face-to-face interaction, or copresence, an important aspect of human action? Why or why not?**

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# Glossary

compulsion of proximity
: People’s need to interact with others in their presence.

# THE BIG PICTURE

# Chapter 5

## Social Interaction and Everyday Life

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**Exercises:** Thinking Sociologically

1. Identify the important elements to the dramaturgical perspective. This chapter shows how such a perspective might be applied in viewing the ministrations of a nurse to a patient. Apply the theory to account for a plumber's visit to a client's home. Are there any similarities? Explain.
2. Smoking cigarettes is a pervasive habit found in many parts of the world and a habit that could be explained by both microsociological and macrosociological forces. Give an example of each that would be relevant to explain the proliferation of smoking. How might your suggested micro- and macro-level analyses be linked?

# BASIC CONCEPTS p. 137

## Learning Objectives

Understand the core concepts of the "impression management" perspective. Recognize how we use impression management techniques

in everyday life.

## Terms to Know

roles • status • social position • impression management • civil inattention • nonverbal communication • response cries • unfocused interaction • focused interaction • encounter • time-space • regionalization • back region • front region • clock time

## Concept Checks

1. What is impression management?
2. Why do we segregate our audiences in daily life?
3. Describe several ways that individuals communicate their emotions to one another.
4. Compare and contrast focused and unfocused interaction.
5. How does time structure human life?

# THEORIES OF SOCIAL INTERACTION p. 149

## Learning Objectives

Understand why the study of social interaction is of major importance in sociology. Learn the four zones of personal space. Learn what ethnomethodology is.

## Terms to Know

social interaction • agency • personal space • ethnomethodology

## Concept Checks

1. What is microsociology?
2. What are three reasons it is important to study daily social interaction?

3. What are the four zones of personal space?
4. How did Garfinkel's students create tense situations?

# CONTEMPORARY RESEARCH ON SOCIAL INTERACTION p. 154

## Learning Objectives

Understand how social interaction and broader features of society are closely related.

## Terms to Know

conversation analysis • interactional vandalism

## Concept Checks

1. What is interactional vandalism?
2. What does Anderson mean by the term *streetwise?*
3. How would you explain the street harassment that women often experience?
4. Can you identify any examples of cosmopolitan canopies in your neighborhood?

# Unanswered Questions p. 162

## Learning Objectives

Consider how face-to-face interactions remain important in the age of the internet.

## Terms to Know

compulsion of proximity

## Concept Checks

1. Is face-to-face interaction, or copresence, an important aspect of human action? Why or why not?

# Glossary

roles
: The expected behaviors of people occupying particular social positions. The idea of social role originally comes from the theater, referring to the parts that actors play in a stage production. In every society, individuals play a number of social roles.

status
: The social honor or prestige a particular group is accorded by other members of a society. Status groups normally display distinct styles of life—patterns of behavior that the members of a group follow. Status privilege may be positive or negative.

social position
: The social identity an individual has in a given group or society. Social positions may be general in nature (those associated with gender roles) or more specific (occupational positions).

impression management
: Preparation for the presentation of one's social role.

civil inattention
: The process whereby individuals in the same physical setting glance at each other and quickly look away to indicate awareness of each other but not intrusiveness.

nonverbal communication
: Communication between individuals based on facial expression or bodily gesture rather than on language.

response cries
: Seemingly involuntary exclamations individuals make when, for example, they are taken by surprise, drop something inadvertently, or want to express pleasure.

unfocused interaction
: Interaction occurring among people present in a particular setting but not engaged in direct face-to-face communication.

focused interaction

Interaction between individuals engaged in a common activity or in direct conversation with one another.

encounter

A meeting between two or more people in a situation of face-to-face interaction. Our daily lives can be seen as a series of different encounters spread out across the course of the day. In modern societies, many of these encounters are with strangers rather than with people we know.

time-space

When and where events occur.

regionalization

The division of social life into different regional settings or zones.

back region

Areas apart from front-region performance, as specified by Erving Goffman, in which individuals are able to relax and behave informally.

front region

Settings of social activity in which people seek to put on a definite "performance" for others, as specified by Erving Goffman.

clock time

Time as measured by the clock, in terms of hours, minutes, and seconds, as opposed to measuring it by the rising and setting of the sun.

social interaction

The process by which we act and react to those around us.

agency

The ability to think, act, and make choices independently.

personal space

The physical space individuals maintain between themselves and others.

ethnomethodology

The study of how people make sense of what others say and do in the course of day-to-day social interaction. Ethnomethodology is concerned with the "ethnomethods" by which people sustain meaningful interchanges with one another.

conversation analysis

The empirical study of conversations, employing techniques drawn from ethnomethodology. Conversation analysis examines details of naturally occurring conversations to reveal the organizational

principles of talk and its role in the production and reproduction of social order.

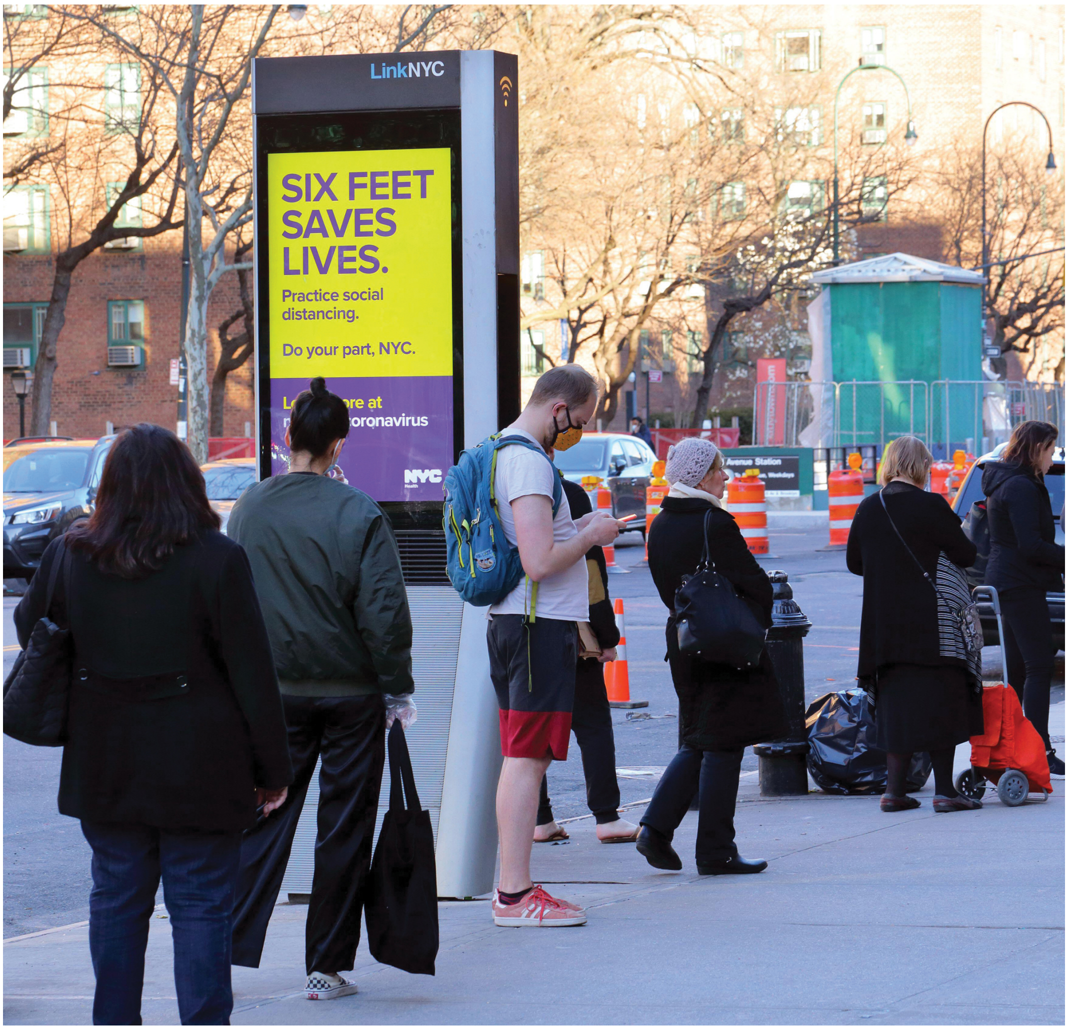
interactional vandalism

The deliberate subversion of the tacit rules of conversation.

compulsion of proximity

People’s need to interact with others in their presence.

# 6 Networks, Groups, and Organizations

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How many people can ultimately contract Covid-19 if a single carrier of the virus is allowed to go about their life unchecked?

1. **200**
2. **5,000**
3. **25,000**
4. **59,000**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

---

## LEARNING OBJECTIVES

1. **Basic Concepts** Learn about the variety and characteristics of networks and groups, as well as the effect they have on individual behavior. Know how to define an organization and understand how organizations developed over the last two centuries.
2. **Theories of Networks, Groups, and Organizations** Learn Max Weber's theory of organizations and view of bureaucracy. Understand the importance of the physical setting of organizations and Michel Foucault's theory of surveillance. Understand the importance of social networks and the advantages they give some people.
3. **Contemporary Research on Networks and Groups** Learn what the term "McDonaldization" means. Understand how social networks can influence you in unexpected ways. Discover how the internet has transformed relationships between groups and social networks.
4. **Unanswered Questions** Learn what Robert Michels meant by the iron law of oligarchy. Consider how information and communication technology is transforming organizations.

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Imagine all the people to whom one average individual is directly and indirectly bound. The spread of Covid-19 can actually help us visualize the gigantic networks to which we are all consciously and unconsciously bound. Difficult as it may be to believe, the correct answer here is, in fact, (d) 59,000 (Snow, 2020)! To understand just how quickly the virus can travel, let us take a look at "patient zero," the first person in the metropolitan New York area to be diagnosed with Covid-19.

On March 2, 2020, New Rochelle resident Lawrence Garbuz, an attorney and founding partner at a Manhattan law firm, tested positive for the new coronavirus. Most likely he caught the virus locally as he had not traveled to any of the countries already hit by the pandemic. Knowing the speed with which the illness could spread, health investigators immediately began retracing the attorney's steps and alerting those with whom he had spent time in the days leading up to his diagnosis. By March 10, the single case had grown to a cluster of 90, and by March 12, New York governor Andrew Cuomo had imposed a one-mile-radius coronavirus containment zone around the city of New Rochelle.

The situation in New Rochelle can best be understood through the lens of sociology, most notably through the concept of the social network, that is, all the direct and indirect connections that link one particular individual or group with other people or groups. Following the footsteps of the investigators in this case, we can trace the network of this individual by examining the trajectory of the contagion.

In the week prior to his diagnosis with Covid-19, Garbuz, a member of a tight-knit Modern Orthodox Jewish community who commutes daily on the Metro-North railway to his office in Manhattan, had had personal contact with between 800 and 1,000 people at two events that he had attended on the same day: a joint bar and bat mitzvah at the Young Israel of New Rochelle synagogue, and the funeral service of Marek Appell, a 91-year-old Holocaust survivor. Not long afterwards, Garbuz fell ill and was taken by a neighbor to a local hospital, where he was initially diagnosed with pneumonia. Only four days later was he tested for the new coronavirus. In the time between his hospital admission and the test, Garbuz came into contact with dozens of physicians, nurses, medical technicians, orderlies, and other patients. Once health officials learned of the diagnosis, they reached out to administrators at SAR High School and Yeshiva University, where Garbuz's 14-year-old daughter and 20-year-old son were students. Classes at both institutions were immediately canceled, and teachers and students who had come in contact with the Garbuz's children were ordered to self-quarantine. Within two weeks, 46 students, faculty, and parents at the high school had tested positive, as had Garbuz's wife and children, the neighbor who had driven him to the hospital, and dozens of other individuals who had spent time with him during that period. In addition, many of the people who had socialized with Garbuz at the bar/bat mitzvah or funeral service had gone on to attend other bar mitzvahs or social functions before realizing that Covid-19 had surreptitiously entered their midst. By mid-April, the total number of infected in Westchester County had exceeded 24,000, making it the tenth-hardest-hit county in the United States.

As we can see from this scenario, Garbuz's network encompassed people he knew both directly (his friends and family) and indirectly (his friends' friends and families). Also included in his network were the organizations in which he participated directly (his temple and law firm) and indirectly (his children's high school and university, the local medical facility). As he was an active member of a large religious community that

spilled over into neighboring towns, the virus was able to quickly penetrate the county, spreading anxiety across the region.

Practically overnight, life in the local Jewish community was totally transformed: The activities that had always helped bind it together—synagogue services, Shabbat dinners, bar and bat mitzvahs, weddings, and funerals—were now proscribed by social-distancing ordinances issued by the government, while school and daily prayers shifted to videoconferencing platforms. In the words of one local rabbi, “Between the first Tuesday and the second Tuesday, it all changed” (Ailworth & Berzon, 2020).

The shock experienced by members of the community as they struggled to adjust to this new disconnected reality was captured by a comment posted on Facebook by Garbuz’s wife, Adina Lewis. Updating her friends on her husband’s condition, she exclaimed, “He is trying to comprehend a world where no one goes out, no social gatherings, no religious services, no Purim!!”(Crescent City Jewish News, 2020).

In this chapter we will consider the importance of social networks to every aspect of our existence, from matters of life and death to getting a job. We will also study different kinds of groups and the ways in which their size, structure, organization, and function affect our behavior. In addition, we will explore how group norms promote conformity, often to disastrous ends. We will then proceed to examine the role played by organizations in American society, looking at major theories of modern organizations as well as at the ways in which organizations are changing in the modern world due to the impact of technology and the prominence of the internet in our group life. We will end by discussing the decentralized nature of organizations and bureaucracies today.

# Glossary

networks
: Sets of informal and formal social ties that link people to each other.

# 1 BASIC CONCEPTS

**Learn about the variety and characteristics of networks and groups, as well as the effect they have on individual behavior. Know how to define an organization and understand how organizations developed over the last two centuries.**

## Networks

Networks are crucial aspects of human life. On the one hand, they can lead to the death of large numbers of people, as occurred in the Covid-19 pandemic. But they also can serve us in many positive ways. You are likely to rely on your networks for a broad range of contacts, from getting into a sorority or fraternity to scoring a summer internship. But understanding how these networks work highlights important differences between biological and social outbreaks (Kucharski, 2020). When a virus spreads through a population, the closer the contact between people, the greater the chance for infection. But in social life, the opposite can also be true. Sociologist Mark Granovetter (1973) demonstrated that there can be enormous strength in "weak ties," particularly among higher socioeconomic groups. Upper-level professional and managerial employees are likely to hear about new jobs through connections such as distant relatives or remote acquaintances. Such weak ties can be of great benefit because relatives or acquaintances tend to have very different sets of connections from one's closer friends, whose social contacts are likely to be similar to one's own. Among lower socioeconomic groups, Granovetter argued, weak ties are not necessarily bridges to other networks and so do not really widen one's opportunities (see also Knoke, 1990; Marsden & Lin, 1982; Wellman et al., 1988).

Most people rely on their personal networks to gain advantages, but not everyone has equal access to powerful networks. In general, Whites and men have more advantageous social networks than do ethnic minorities and women. Some sociologists argue, for example, that women's business, professional, and political networks are fewer and weaker than men's, so that women's power in these spheres is reduced (Brass, 1985). Yet as more and more women move up into higher-level occupational and political positions, the resulting networks can foster further advancement. One

study found that women are more likely to be hired or promoted into job levels that already have a high proportion of women (Cohen et al., 1998).

## The Internet as Social Network

Launched in 2004, Facebook has more than 2.45 billion monthly active users and is one of the most popular tools for building online social networks.

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Our opportunities to belong to and access social networks have skyrocketed in recent years due to the internet. Until the early 1990s, when the World Wide Web was developed, there were few internet users outside university and scientific communities. By the beginning of 2022, however, an estimated 307.2 million Americans were using the internet (Kemp, 2022), and while 52 percent of American adults used the internet in 2000,

93 percent were online in 2021 (Pew Research Center, 2021a). With such rapid communication and global reach, it is now possible to radically extend one's personal networks. Fully 57 percent of American teens have made new friends online (Lenhart, 2015). The internet also enables people who might otherwise lack contact with others to become part of global networks. For example, people too ill to leave their homes can join online social networks or consult message boards, people in small rural communities can now take online college courses (Lewin, 2012), and long-lost high school friends can reconnect via social media.

The internet fosters the creation of new relationships, often without the emotional and social baggage or constraints that go along with face-to-face encounters. In the absence of the usual physical and social cues, such as skin color or residential address, people can get together electronically on the basis of shared interests, such as gaming, rather than similar social characteristics. Factors such as social position, wealth, race, ethnicity, gender, and physical disability are less likely to cloud the social interaction (Coate, 1998; Jones, 1995; Kollock & Smith, 1996). In fact, technologies like Twitter and Instagram allow people from all walks of life to catch glimpses into the lives of celebrities (as well as noncelebs).

One limitation of internet-based social networks is that not everyone has equal access to the internet. Lower-income persons and ethnic minorities are less likely than wealthier persons and Whites to have internet access. But while a digital divide remains, the gaps have narrowed considerably in recent years. For example, in 2000, 81 percent of American adults in households earning $75,000 or more a year used the internet, compared to just 34 percent of those who made less than $30,000. By 2021, however, this nearly 50 percent gap had narrowed to 13 percent, with 86 percent of those who made less than $30,000 per year using the internet (Pew Research Center, 2021a). There remains a larger gap in usage by level of education: While 98 percent of adults with a college degree are internet users, that proportion drops to 86 percent for those with less than a high school education. A similar gap in internet use exists between young adults (ages 18 to 29) and older adults (ages 65 and older): While 99 percent of young adults are using the internet, the same can be said of only 75 percent of older adults (Pew Research Center, 2021a). This pattern is not limited to the United States; rates of internet use are creeping up across the globe, enabling individuals to connect with anyone in the world who shares their interests.

# Groups

Much of importance in life occurs through some type of social group. You and your roommate make up a social group, as do the members of your introductory sociology class. A social group is a collection of people who have a common identity and who regularly interact with one another on the basis of shared expectations concerning behavior. People who belong to the same social group identify with one another, expect one another to conform to certain ways of thinking and acting, and recognize the boundaries that separate them from other groups or people. In our need to congregate and belong, we have created a rich and varied group life that gives us our norms, practices, and values—our whole way of life.

We sometimes feel alone, yet we are seldom far from one kind of group or another. Every day, nearly all of us move through various social situations. We hang out with friends, study with classmates, play team sports, and go online to meet people who share our interests.

But just being in one another's company does not make a collection of individuals a social group. People milling around in crowds, waiting for a bus, or strolling on a beach make up what is called a social aggregate—a collection of people who happen to be together in a particular place but do not significantly interact or identify with one another. People waiting together at a bus station, for example, may be aware of one another, but they are unlikely to think of themselves as a "we"—the group waiting for the next bus to Poughkeepsie or Des Moines. By the same token, people may make up a social category—people sharing a common characteristic such as gender or occupation—without necessarily interacting or identifying with one another. The sense of belonging to a common social group is missing.

Group life differs greatly in how intensely members experience it. Beginning with the family—the first group to which most of us belong—many of the groups that shape our personalities and lives are those in which we experience strong emotional ties. This is common not only for families but also for groups of friends, including gangs and other peer groups, all of which are known as primary groups. Primary groups are small groups characterized by face-to-face interaction, intimacy, and a strong sense of commitment. Members of primary groups often experience unity, a merging of the self with the group into one personal "we." The

sociologist Charles Horton Cooley (1864–1929) termed such groups “primary” because he believed that they were the basic form of association, exerting a long-lasting influence on the development of our social selves (Cooley, 1902/1964).

In contrast, secondary groups are large and impersonal and seldom involve intense emotional ties, enduring relationships, powerful commitments to the group itself, or a feeling of unity. Examples of secondary groups include businesses, schools, work groups, athletic clubs, and governmental bodies. We rarely feel we can be ourselves in a secondary group; rather, we are often playing a role, such as employee or student. Cooley argued that while people belong to primary groups mainly because membership is fulfilling, people join secondary groups to achieve a specific goal: to earn a living, get a college degree, or compete on a sports team. Secondary groups may become primary groups. For example, when students taking a course together socialize after class, they create bonds of friendship that constitute a primary group.

What makes the people in the image on the left a social aggregate and the people on the right a social group?

For most of human history, nearly all interactions took place within primary groups. This pattern began to change with the emergence of larger agrarian societies, which included such secondary groups as those based on governmental roles or occupations. Today, most of our waking hours are spent within secondary groups, although primary groups remain a basic part of our lives.

Some early sociologists, such as Cooley, worried about a loss of intimacy as more and more interactions revolved around large, impersonal organizations. However, what Cooley saw as the growing impersonality and anonymity of modern life may also offer increasing tolerance of individual differences. Primary groups often enforce strict conformity to group standards (Durkheim, 1893/1964; Simmel, 1955). Secondary groups are more likely to be concerned with accomplishing a task than with enforcing conformity.

# Conformity

Not so long ago, the only part of the body that American teenage girls were likely to pierce was the ears—one hole per ear, enough to hold a single pair of earrings. For the vast majority of boys, piercing was not an option. Today, earrings are common for men. From teenage boys to male professional athletes to college students, a growing number of males now

sport multiple earrings. Pressure to conform to the latest styles is especially strong among teenagers and young adults, among whom the need for group acceptance is often acute.

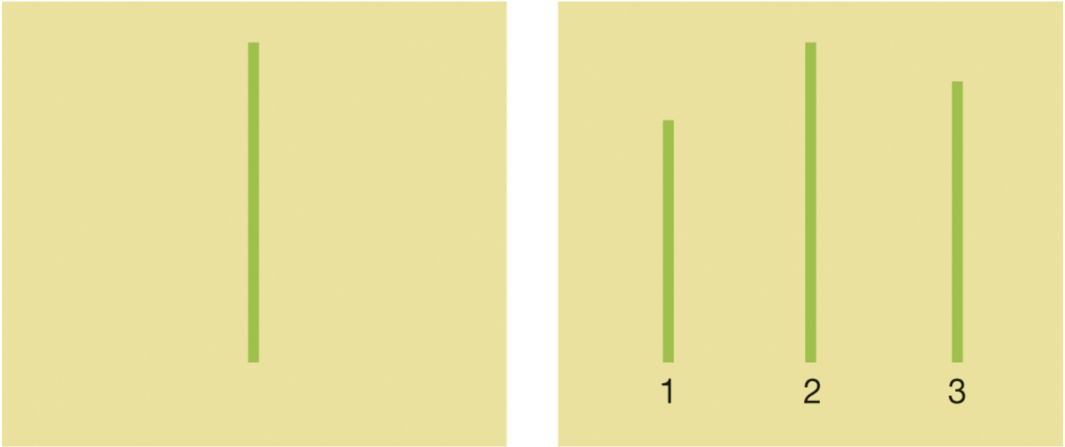
While sporting earrings or the latest style of jeans may seem relatively harmless, conformity to group pressure can lead to destructive behavior, such as drug abuse or even murder. For this reason, sociologists and social psychologists have long sought to understand why most people tend to go along with others and under what circumstances they do not.

## Going Along With the Group: Asch's Research

Some of the earliest studies of conformity to group pressures were conducted by psychologist Solomon Asch (1952). In a classic experiment, Asch asked subjects to decide which of three lines of different length most closely matched the length of a fourth line (**Figure 6.1**). The differences were obvious; subjects had no difficulty making the correct match. Asch then arranged a version of the experiment in which the subjects were asked to make the matches in a group setting, with each person calling out the answer in turn. In this version, all but one of the subjects were actually Asch's confederates. Each confederate picked as matches two lines that were clearly unequal in length. The unwitting subject, one of the last to answer, felt enormous group pressure to make the same match. Amazingly, one-third of the subjects gave the same answer as the others in the group at least half the time, even though that answer was clearly wrong. They sometimes stammered and fidgeted when doing so, but they nonetheless yielded to the unspoken pressure to conform to the group's decision. Asch's experiments showed that many people are willing to discount their own perceptions rather than buck group consensus.

Figure 6.1

**THE ASCH TASK**




*In the Asch task, participants were shown a standard line (left) and then three comparison lines. Their task was simply to say which of the three lines matched the standard line. When confederates gave false answers first, one-third of participants conformed by giving the wrong answer at least half the time.*

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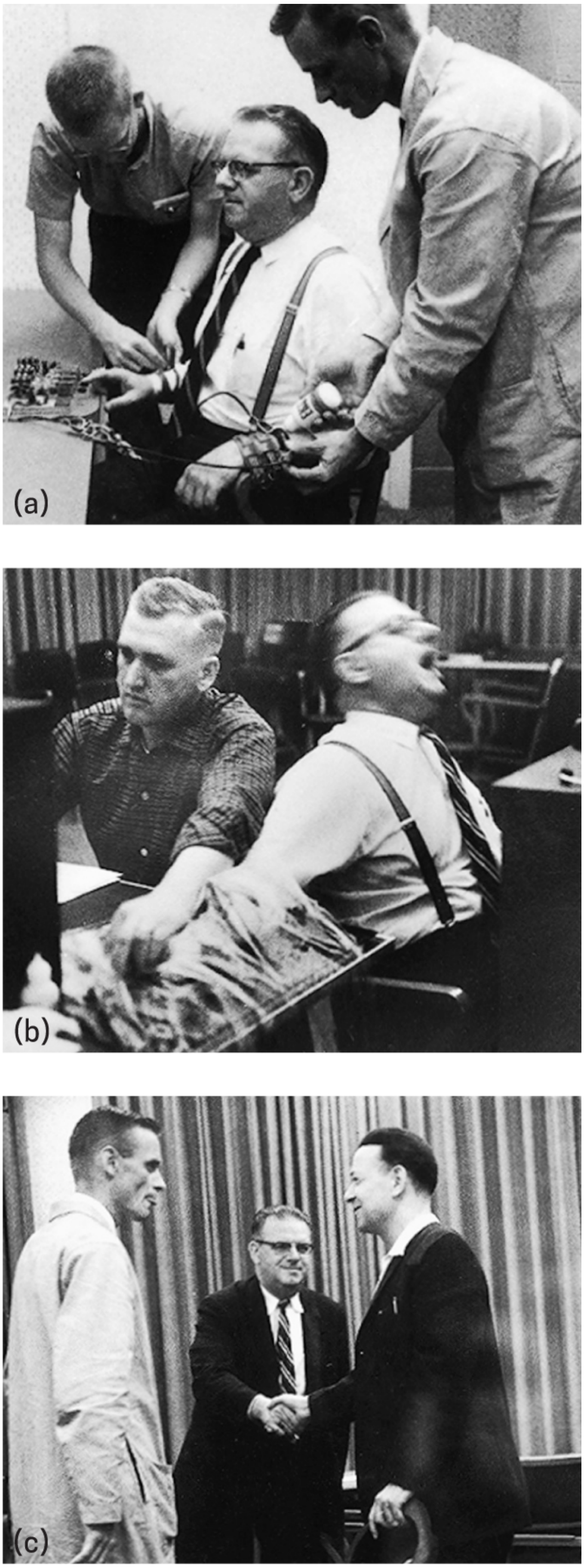
## Obedience to Authority: Milgram's Research

Another classic study of conformity was conducted by Stanley Milgram (1963). Milgram's work was intended to shed some light on what happened in Nazi Germany during World War II. How could ordinary German citizens have gone along with, and even participated in, the mass extermination of millions of Jews, Roma, homosexuals, intellectuals, and others whom the Nazis judged to be inferior or undesirable?

Obedience is a kind of conformity, and Milgram sought to find its limits. He wanted to see how far a person would go when ordered by a scientist to give another person increasingly powerful electric shocks. So he set up an experiment that he told the subjects was about memorizing pairs of words. In reality, it was about obedience to authority. Milgram's study would not be permitted today, because the deception of subjects and its potential for doing psychological harm would violate current university ethics standards.


(a)
(b)
(c)

(a) The Milgram experiment required participants to "shock" the confederate learner (seated). The research participant (left) helped apply the electrodes. (b) An obedient participant shocks the learner in the "touch" condition. Fewer than one-third obeyed the experimenter in this condition. (c) Afterward, all the participants were introduced to the confederate learner so they could see he was not harmed.

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The men who volunteered for the study were supposedly randomly divided into "teachers" and "learners." In fact, the learners were Milgram's confederates. The teacher was told to read pairs of words from a list that the learner was to memorize. Whenever the learner made a mistake, the teacher was to give him an electric shock by flipping a switch on a fake but official-looking machine. The control board indicated shock levels ranging from "15 volts—slight shock" to "450 volts—danger, severe shock." For each mistake, the voltage was to be increased, until it reached the highest level. In reality, the learner, who was usually concealed from the teacher by a screen, never received any shocks.

As the experiment progressed, the learner began to scream out in pain for the teacher to stop delivering the shocks. (The screams, which grew louder as the voltage rose, had actually been prerecorded.) Milgram's assistant, who was administering the experiment, exercised his authority as a scientist and, if the teacher tried to quit, ordered the teacher to continue administering shocks. The assistant would say things such as "the experiment requires that you continue," even when the learner was tearfully protesting—even when he shrieked about his "bad heart."

The teacher was confronted with a major moral decision: Should he obey the scientist and go along with the experiment, even if it meant injuring another human being? Much to Milgram's surprise, over half the subjects administered the shocks until the maximum voltage was reached and the learner's screams had subsided into an eerie silence as he presumably died of a heart attack. How could ordinary people so easily obey orders that would turn them into possible accomplices to murder?

The answer, Milgram found, was surprisingly simple. Although it is obvious that soldiers in training will obey orders given by someone in a position of power or authority, ordinary citizens will often do the same—even if those orders have horrible consequences. From this experience, we can learn something about Nazi atrocities during World War II, which were

Milgram's original concern. Many of the ordinary Germans who participated in the mass executions in concentration camps did so on the grounds that they were just following orders. Milgram's research has sobering implications for anyone who thinks that only "others" will bend to authority, but "not me" (Zimbardo et al., 1977).

# Organizations

People frequently band together to pursue activities that they cannot do by themselves. A principal means of accomplishing such cooperative actions —whether it's raising money for ALS research, winning a football game, or becoming a profitable corporation—is the organization, a group with an identifiable membership that engages in concerted collective actions to achieve a common purpose (Aldrich & Marsden, 1988). An organization can be a small primary group, but it is more likely a larger secondary one. Universities, religious bodies, and business corporations are all examples of organizations. Such organizations are a central feature of all societies, and their study is a core concern of sociology.

Organizations tend to be highly formal in modern industrial and postindustrial societies. A formal organization is designed to achieve its objectives, often by means of explicit rules, regulations, and procedures. The modern bureaucratic organization, discussed later in this chapter, is a prime example of a formal organization. As Max Weber (1921/1979) recognized just over a century ago, there has been a long-term trend in Europe and North America toward formal organizations, in part because formality is often a requirement for legal standing. For a college or university to be accredited, for example, it must satisfy explicit written standards governing everything from grading policy to faculty performance to fire codes. Today, formal organizations are the dominant form of organization throughout the world.

Social systems in the traditional world developed as a result of custom and habit. Modern organizations are designed with definite aims and housed in buildings or physical settings constructed to help realize those aims. Organizations play a more important part in our everyday lives than ever before. Besides delivering us into this world (hospital), they also mark our progress through it (school) and see us out of it when we die (hospital, funeral home). Even before we are born, our mothers, and often our fathers, are involved in birthing classes, pregnancy checkups, and so forth,

all carried out within hospitals and other medical organizations. Today, every child born is registered by government organizations, which collect information on all of us from birth to death. Most people today die in a hospital—not at home, as was once the case—and each death must be formally registered with the government.

It is easy to see why organizations are so important today. In the premodern world, families, relatives, and neighbors provided for most needs—food, the instruction of children, work, and leisure-time activities. In modern times, many of our requirements are filled by people we never meet and who might live and work thousands of miles away. Substantial coordination of activities and resources—which organizations provide—is needed in such circumstances.

But the tremendous influence organizations have on our lives cannot be seen as wholly beneficial. Organizations often take things out of our own hands and put them under the control of officials or experts over whom we have little influence. For instance, we are required to do certain things the government tells us to do—pay taxes, obey laws, fight wars—or face punishment. As sources of social power, organizations can subject people to dictates they may be powerless to resist.

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**CONCEPT CHECKS**

1. **According to Granovetter, what are the benefits of weak ties? Why?**
2. **What is the difference between social aggregates and social groups? Give examples that illustrate this difference.**
3. **Describe the main characteristics of primary and secondary groups.**
4. **What role do organizations play in contemporary society?**

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# Glossary

social group
: A collection of people who regularly interact with one another on the basis of shared expectations concerning behavior and who share a sense of common identity.

social aggregate

A simple collection of people who happen to be together in a particular place but do not significantly interact or identify with one another.

social category

People who share a common characteristic (such as gender or occupation) but do not necessarily interact or identify with one another.

primary groups

Groups characterized by intense emotional ties, face-to-face interaction, intimacy, and a strong, enduring sense of commitment.

secondary groups

Groups characterized by large size and by impersonal, fleeting relationships.

organization

A large group of individuals with a definite set of authority relations. Many types of organizations exist in industrialized societies, influencing most aspects of our lives. While not all organizations are bureaucratic, there are close links between the development of organizations and bureaucratic tendencies.

formal organization

A group that is rationally designed to achieve its objectives, often by means of explicit rules, regulations, and procedures.

# 2 THEORIES OF NETWORKS, GROUPS, AND ORGANIZATIONS

**Learn Max Weber's theory of organizations and view of bureaucracy. Understand the importance of the physical setting of organizations and Michel Foucault's theory of surveillance. Understand the importance of social networks and the advantages they give some people.**

## In-Groups and Out-Groups

The "sense of belonging" that characterizes social groups is sometimes strengthened by scorning other groups (Sartre, 1948/1965). This is especially true of racist groups, which promote their identity as superior by hating "inferior" groups. Jews, Catholics, African Americans and other people of color, immigrants, and gay people historically—and Muslims more recently—have been the targets of such prejudice in the United States. This sense of group identity created through scorn is dramatically illustrated by the rantings of a racist skinhead group called Combat 18: "We must realize that we, and our enemies, are engaged in a struggle for the survival of the European races. If we fail we will be destroyed along with European civilization" (South Poverty Law Center, n.d.).

Such proud, disdainful language illustrates the sociological distinction between in-groups and out-groups. In-groups are groups toward which one feels loyalty and respect—the groups that "we" belong to. Out-groups are groups toward which one feels antagonism and contempt—"those people." At one time or another, many of us have used in-group/out-group imagery to trumpet what we believe to be our group's strengths vis-à-vis another group's presumed weaknesses. For example, fraternity or sorority members may bolster their feelings of superiority—in academics, sports, or campus image—by ridiculing the members of a different house. Similarly, a church may hold up its "truths" as the only

ones, while native-born Americans may accuse immigrants—always outsiders upon arriving in a new country—as ruining the country for “real Americans.”

## Reference Groups

Advertising creates a set of imaginary reference groups meant to influence consumers’ buying habits by presenting unlikely, often impossible, ideals to which consumers aspire.

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We often judge ourselves by how we think we appear to others, which Cooley termed the “looking-glass self.” Groups as well as individuals provide the standards by which we make self-evaluations. Robert K. Merton (1938/1968) elaborated on Cooley’s work by introducing the concept of the reference group—a group that provides a standard for judging one’s attitudes or behaviors (see also Hyman & Singer, 1968). Family, peers, classmates, and coworkers are crucial reference groups. However, you don’t have to belong to a group for it to be a reference group. Regardless of their station in life, a person may identify with the wealth and power of Fortune 500 corporate executives, admire the contributions of Nobel Prize–winning scientists, or be captivated by the

glitter of Hollywood stars. Although few of us interact socially with such reference groups, we may take pride in identifying with them, glorify their accomplishments, and even imitate the behavior of their members. This is why it is critical for children—minority children in particular, whose groups are often represented with negative stereotypes in the media—to be exposed to reference groups that model positive standards of behavior.

Reference groups may be primary (such as the family) or secondary (such as a group of soldiers). They may even be fictional. One of the chief functions of advertising is to create a set of imaginary reference groups that will influence consumers' buying habits. For example, when cosmetic ads feature thin models with flawless complexions, the message is simple: "If you want to look as though you are part of an in-group of highly attractive, eternally youthful women, buy this product." In reality, the models seldom have the unblemished features depicted; instead, the ideal features are constructed through artful lighting, photographic techniques, and computer enhancement. Similarly, the happy-go-lucky, physically perfect young men and women seen sailing or playing volleyball or hang gliding in beer commercials have little to do with the reality of most of our lives—or, indeed, with the lives of the actors in those commercials. The message, however, is otherwise: "Drink this beer, and you will be a member of the carefree in-group in this ad."

# The Effects of Size

Another significant way in which groups differ has to do with their size. Sociological interest in group size can be traced to Georg Simmel (1858–1918), a German sociologist who studied and theorized about the impact of small groups on people's behavior. Since Simmel's time, small-group researchers have examined the effects of size on both the quality of interaction in the group and the effectiveness of the group in accomplishing certain tasks (Bales, 1953, 1970; Homans, 1950; Mills, 1967).

## Dyads

The simplest group, which Simmel (1955) called a dyad, consists of two people. Simmel reasoned that dyads, which involve both intimacy and

conflict, are likely to be simultaneously intense and unstable. To survive, they require the full attention and cooperation of both parties. If one person withdraws from the dyad, it vanishes. Dyads are typically the source of our most elementary social bonds, often constituting the group in which we are likely to share our deepest secrets. But dyads can be fragile. That is why, Simmel believed, numerous cultural and legal supports for marriage—an example of a dyad—are found in societies in which marriage is regarded as an important source of social stability.

## Triads

Adding a third person changes the group relationship. Simmel used the term triad to describe a group of three people. Triads tend to be more stable than dyads because the presence of a third person relieves some of the pressure on the other two members to always get along and energize the relationship. In a triad, one person can temporarily withdraw attention from the relationship without necessarily threatening it. In addition, if two of the members have a disagreement, the third can play the role of mediator, as when you try to patch up a falling-out between two of your friends.

On the other hand, alliances (sometimes termed *coalitions*) may form between two members of a triad, enabling them to gang up on the third and thereby destabilize the group. Alliances are most likely to form when no one member is clearly dominant and when all three members are competing for the same thing—for example, when three friends are given a pair of tickets to a concert and have to decide which two will go. The TV series *Survivor* provides many examples of alliance formation, as the program's characters forge special relationships with one another to avoid being eliminated in the weekly group vote. In forming an alliance, a member of a triad is most likely to choose the weaker of the two other members as a partner, if there is one. In what have been termed *revolutionary coalitions*, the two weaker members form an alliance to overthrow the stronger one (Caplow, 1956, 1959, 1969).

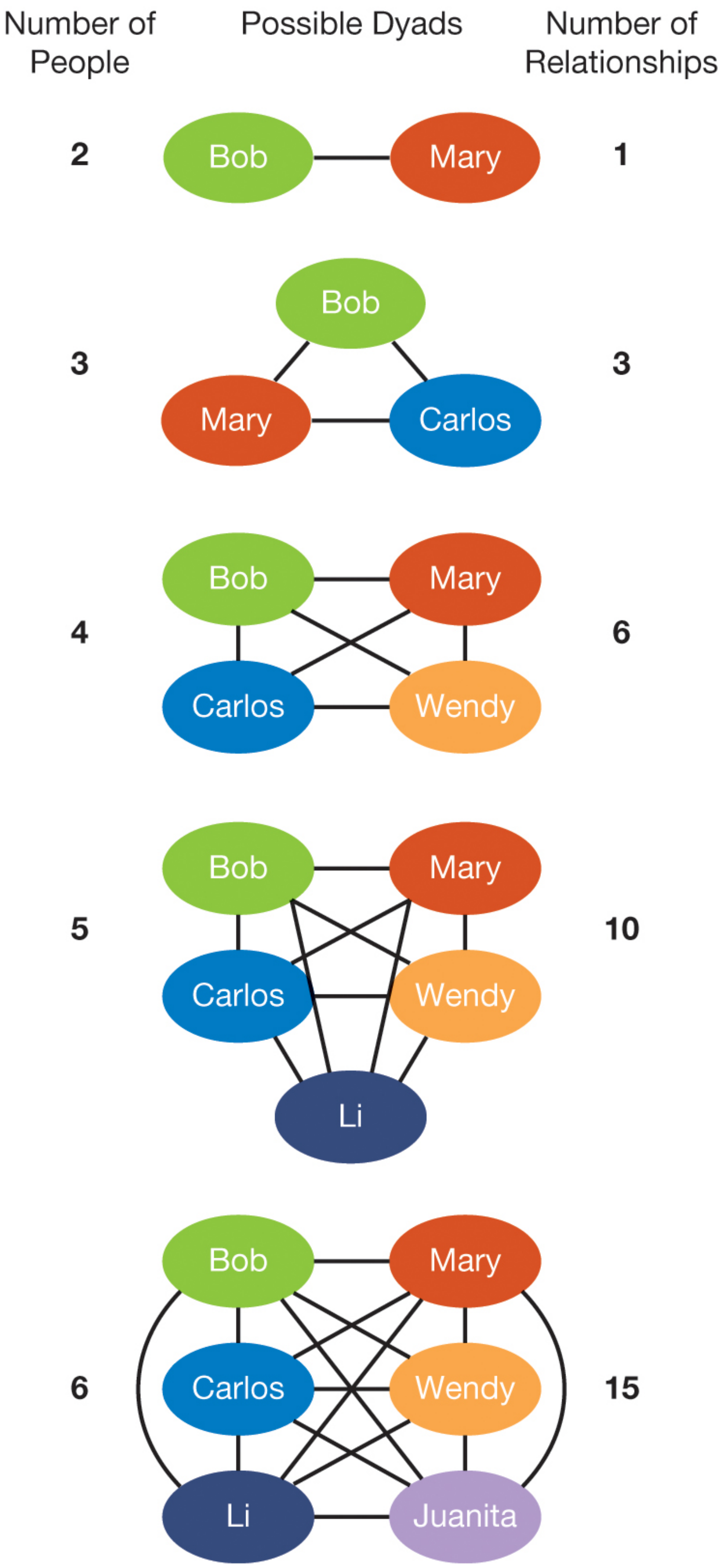
## Larger Groups

Going from a dyad to a triad illustrates an important sociological principle first identified by Simmel: In most cases, as groups grow in

size, their intensity decreases while their stability and exclusivity increase. Larger groups have less intense interactions, simply because a larger number of potential smaller group relationships exist as outlets for individuals who are not getting along with other members of the group. In a dyad, only one relationship is possible; in a triad, three different two-person relationships can occur. Adding a fourth person leads to six possible two-person relationships, in addition to potential subgroups of three. In a 10-person group, the number of possible two-person relationships explodes to 45 (**Figure 6.2**)! When one relationship doesn't work out, you can easily move to another, as you probably often do at large parties.

Figure 6.2

**DYADS**


Number of People
Possible Dyads
Number of Relationships
2
Bob
Mary
1
3
Bob
Mary
Carlos
3
4
Bob
Mary
Carlos
Wendy
6
5
Bob
Mary
Carlos
Wendy
Li
10
6
Bob
Mary
Carlos
Wendy
Li
Juanita
15

*The larger the number of people, the greater the possible number of relationships. Note that this figure illustrates only dyads; if triads and more complex coalitions were included, the numbers would be still greater (4 people yield 10 possibilities). Even a 10-person group can produce 45 possible dyads!*

At the same time, larger groups tend to be more stable than smaller ones because they can survive the withdrawal of some members. A marriage or romantic relationship falls apart if one person leaves, whereas an athletic team or drama club routinely survives, though it may temporarily suffer from the loss of its graduating seniors.

Larger groups also tend to be more exclusive because it is easier for members to limit social relationships to the group itself and to avoid relationships with nonmembers. This sense of being part of an in-group, or clique, is sometimes found in fraternities, sororities, and other campus organizations. Cliquishness is especially likely to occur when a group's members are similar in such social characteristics as age, gender, class, race, or ethnicity. People from rich families, for example, may be reluctant to fraternize with working-class groups, men may prefer to go to the basketball court with other men, and students who belong to a particular ethnic group (for example, African Americans, Latinos, or Asian Americans) may seek out one another in the dorm or cafeteria. Even so, groups do not always restrict relationships with outsiders. A group with a socially diverse membership is likely to foster a high degree of interaction with people outside the group (Blau, 1977). For example, if your social group or club has members from different social classes or ethnic groups, you are more likely to appreciate such social differences from firsthand experience and seek them out in other aspects of your life.

Beyond a certain size (perhaps a dozen people), groups tend to develop a formal structure. Formal leadership roles may arise, such as president or secretary, and official rules may be developed to govern what the group does.

# Theories of Organizations

Max Weber developed the first systematic interpretation of the rise of modern organizations. Organizations, he argued, are ways of coordinating the activities of human beings or the goods they produce in a stable way across space and time. Weber emphasized that the development of organizations depends on the control of information, and he stressed the central importance of writing in this process. An organization needs written rules to function and files in which to store its "memory." Weber saw organizations as strongly hierarchical, with power tending to concentrate at the top. Was Weber right? It matters a great deal, for Weber detected a clash as well as a connection between modern organizations and democracy that he believed had far-reaching consequences for social life.

## Bureaucracy

All large-scale organizations, according to Weber, tend to be bureaucratic in nature. The word *bureaucracy* was coined in 1745 by Jean-Claude Marie Vincent de Gournay, who combined the word *bureau*, meaning both an office and a writing table, with the suffix *cracy*, a term derived from the Greek verb meaning "to rule." Bureaucracy is thus the rule of officials. The term was first applied only to government officials, but it gradually came to refer to large organizations in general.

From the beginning, the concept was used disparagingly. De Gournay spoke of the developing power of officials as "an illness called bureaumania." The nineteenth-century French novelist Honoré de Balzac saw bureaucracy as "the giant power wielded by pygmies." This view persists today. Bureaucracy is frequently associated with red tape, inefficiency, and wastefulness. Others, however, have seen bureaucracy as a model of carefulness, precision, and effective administration. Bureaucracy, they argue, is the most efficient form of human organization, because, in it, all tasks are regulated by strict procedures.

Weber's account of bureaucracy steers between these two extremes. A limited number of bureaucratic organizations, he pointed out, existed in traditional civilizations. For example, a bureaucratic officialdom in imperial China was responsible for the overall affairs of government. But only in modern times have bureaucracies developed fully.

According to Weber, the expansion of bureaucracy is inevitable in modern societies; bureaucratic authority is the only way of coping with the administrative requirements of large-scale social systems. However, as we will see, Weber also believed bureaucracy exhibits a number of major failings that have important implications for modern social life.

To study the origins and nature of bureaucratic organizations, Weber constructed an ideal type of bureaucracy. (*Ideal* here refers not to what is most desirable but to a pure form of bureaucratic organization, one that accentuates certain features of real cases so as to pinpoint essential characteristics.) Weber (1921/1979) listed several characteristics of the ideal type of bureaucracy:

1. **There is a clear-cut hierarchy of authority.** Tasks in the organization are distributed as "official duties." A bureaucracy looks like a pyramid, with the positions of highest authority at the top. A chain of command stretches from top to bottom, thus making possible the coordination of decisions. Each higher office controls and supervises the one below it in the hierarchy.
2. **Written rules govern the conduct of officials at all levels of the organization.** This does not mean that bureaucratic duties are just a matter of routine. The higher the office, the more the rules tend to encompass a wide variety of cases and to demand flexibility in their interpretation.
3. **Officials work full-time and are salaried.** Each job in the hierarchy has a definite and fixed salary attached to it. Individuals are expected to make a career within the organization. Promotion is possible on the basis of capability, seniority, or a combination of the two.
4. **There is a separation between the tasks of officials within the organization and their lives outside.** The home lives of officials are distinct from their activities in the workplace and are also physically separated from it.
5. **No members of the organization own the materials with which they operate.** The development of bureaucracy, according to Weber, separates workers from the control of their means of production. In traditional communities, farmers and craft workers usually had control over their processes of production and owned the tools they used. In bureaucracies, officials do not own the offices they work in, the desks they sit at, or the office machinery they use.

While bureaucracy is often associated with long lines and excessive paperwork, it can also be an efficient way to organize modern societies. Here, a young woman attends a Dream Relief workshop, where undocumented immigrants can apply for work permits and deportation deferrals.

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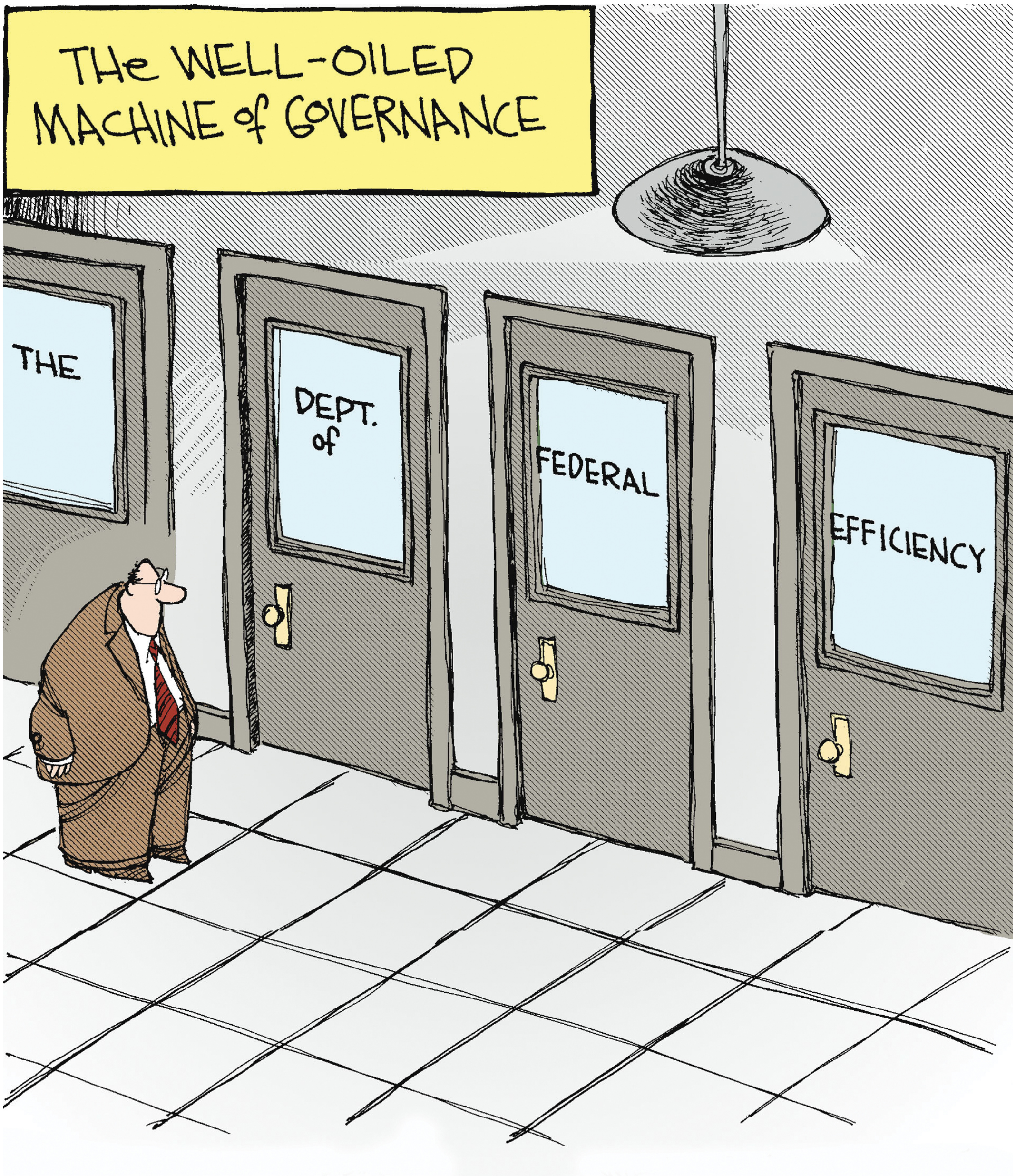
Weber believed that the more an organization approaches the ideal type of bureaucracy, the more effective it will be in reaching its goals. He likened bureaucracies to sophisticated machines operating according to rational principles (see Chapter 1). Yet he also recognized that bureaucracy could be inefficient and that many bureaucratic jobs are dull, offering little opportunity for creativity. Although Weber feared that the bureaucratization of society could have negative consequences, he concluded that bureaucratic routine and the authority of officialdom were the prices we pay for the technical effectiveness of bureaucratic organizations. Since Weber's time, the bureaucratization of society has become more widespread. Critics of this development who share Weber's initial concerns have questioned whether the efficiency of rational organizations comes at a cost greater than Weber imagined. The most prominent of these critiques is known as the "McDonaldization" of society, which we will discuss later in this chapter.

## Formal and Informal Relations Within Bureaucracies

Weber's analysis of bureaucracy gave prime place to formal relations within organizations, relations as stated in the organization rules. Weber had little to say about the informal connections and small-group relations that exist in all organizations. But in bureaucracies, informal ways of doing things often allow for a flexibility that couldn't otherwise be achieved.

In a classic study, Peter Blau (1963) looked at informal relations in a government agency that investigated possible income-tax violations. Agents who came across difficult cases were supposed to discuss them with their immediate supervisor; the rules of procedure stated that they should not consult colleagues at their same level. Most agents were wary about approaching their supervisors, however, because they felt it might suggest a lack of competence on their part and reduce their chances for promotion. Hence, they usually consulted one another, violating the official rules. This breaking of the rules not only helped provide concrete advice but also reduced the anxieties involved in working alone. A cohesive set of loyalties representative of a primary group thus developed among those working at the same level. The problems these workers faced, Blau concludes, were probably addressed more effectively as a result. The group was able to develop informal procedures that allowed for more initiative and responsibility than the formal rules of the organization permitted.

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Bureaucracies are often perceived as inefficient and fraught with red tape.

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Informal networks tend to develop at all levels of organizations. At the top, personal ties and connections may be more important than the formal situations in which decisions are supposed to be made. For example, meetings of boards of directors and shareholders supposedly determine the policies of business corporations. In practice, a few members of the board often run the corporation, making their decisions informally and expecting the rest of the board to approve them. Informal networks of this sort can also stretch across different corporations. Business leaders from

different firms frequently consult one another informally and may belong to the same clubs and social circles.

John Meyer and Brian Rowan (1977) argue that formal rules and procedures are usually quite distant from the practices an organization's members actually adopt. Formal rules, in their view, are often "myths" that people profess to follow but that have little substance in reality. The rules serve to legitimize—to justify—ways in which tasks are carried out, even while these ways may diverge greatly from how the rules say things are supposed to be done. Formal procedures, Meyer and Rowan point out, often have a ceremonial or ritual character. People make a show of conforming to them but get on with their real work using other, more informal procedures. For example, rules governing ward procedure in a hospital help justify how nurses act toward patients. Thus, a nurse will faithfully fill in the chart at the end of a patient's bed but will actually check progress by means of other, informal criteria—how the patient looks and whether the patient seems alert and lively. Rigorously keeping up the charts impresses the patients and keeps the doctors happy, but it is not always essential to the nurse's assessments.

**Table 6.1 APPLYING SOCIOLOGY TO NETWORKS, GROUPS, AND ORGANIZATIONS**

| THEORY | APPROACH TO UNDERSTANDING GROUPS | CONTEMPORARY APPLICATION |
|---|---|---|
| **Weber's theory of organizations and bureaucracy** | A bureaucracy is a type of organization with a clear hierarchy of authority, written rules of procedure, and full-time, salaried officials. | Students at a large university may be frustrated by red tape and bureaucracy, as they consult many different offices before arriving at an answer to a question about their tuition bill. |

| THEORY | APPROACH TO UNDERSTANDING GROUPS | CONTEMPORARY APPLICATION |
|---|---|---|
| **Foucault's theory of surveillance** | In hierarchical organizations, persons with lower levels of authority and status are especially susceptible to surveillance, including direct oversight by superiors, and the monitoring of their personal records like employment history. | Salesclerks at discount chain stores are monitored by hidden cameras, by managers' checks to make sure their cash drawers equal their sales each night, and other forms of oversight. |
| **Simmel's theory of group size** | Human interactions are shaped by group sizes. Larger groups have less intense interactions, because a larger number of potential smaller group relationships exist as outlets for individuals who are not getting along with other members of the group. | A college student is nervous about living with just one roommate (dyad), in case they don't get along, and two roommates (triad), in case the other two "gang up" on the student. A larger setting, like a group house or fraternity/sorority, provides a greater number of less intense social ties. |

| THEORY | APPROACH TO UNDERSTANDING GROUPS | CONTEMPORARY APPLICATION |
|---|---|---|
| **Merton's reference group theory** | Reference groups provide a standard for judging one's attitudes or behaviors. Humans use as reference groups people they know, as well as people they don't (e.g., media figures). | A star high school athlete feels very confident in their abilities, as they rank first in their school. However, when they compare their feats to Olympians their age, or when they compete in varsity sports in college, their own skills may feel less stellar in comparison. |

Deciding how much informal procedures help or hinder the effectiveness of organizations is not a simple matter. Systems that resemble Weber's ideal type tend to give rise to a multitude of unofficial ways of doing things. This work-around happens partly because the flexibility that is lacking ends up being achieved by unofficial tinkering with formal rules. For those in dull jobs, informal procedures often create a more satisfying work environment. Informal connections among officials in higher positions may be effective in ways that aid the organization as a whole.

## The Control of Time and Space

Michel Foucault (1971, 1975) showed that the architecture of an organization is directly involved with its social makeup and system of authority. By studying the physical characteristics of organizations, we can shed new light on the problems Weber analyzed. The offices Weber discussed abstractly are also architectural settings—rooms, separated by corridors. The buildings of large firms are sometimes actually constructed as a hierarchy, in which the more elevated one's position, the nearer to the top of the building one's office is; not for nothing does "the top floor" refer to those who hold ultimate power in an organization.

In many other ways, the geography of an organization affects its functioning, especially when systems rely heavily on informal relationships. Physical proximity makes forming primary groups easier, whereas physical distance can polarize groups, resulting in a “them” and “us” attitude between departments.

In addition to direct supervision of subordinates’ work, surveillance also takes the form of files, records, and work histories.

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The arrangement of rooms, hallways, and open spaces in an organization’s buildings provides basic clues to how the organization’s system of authority operates. In some organizations, people work collectively in open settings. Because of the dull, repetitive nature of certain kinds of industrial work, such as assembly-line production, regular supervision is needed to ensure that workers sustain the pace of labor. The same is often true of routine work carried out by telephone operators who respond to calls for information and who sit together where their activities are visible to their supervisors. Foucault laid great emphasis on how visibility, or lack of it, in the architectural settings of modern organizations influences and expresses patterns of authority. The

level of visibility determines how easily subordinates can be subject to surveillance—the supervision of activities in organizations. In modern organizations, everyone, even those in relatively high positions of authority, is subject to surveillance, but the lowlier a person is, the more their behavior tends to be scrutinized.

Surveillance takes two forms. One is the direct supervision of the work of subordinates by superiors. Consider the example of a school classroom. Pupils sit at tables or desks, usually arranged in rows, all in view of the teacher. They are supposed to look alert or be absorbed in their work. Of course, the extent to which this actually happens depends on the ability of the teacher to command attention and the inclinations of the children to do what is expected of them.

The second type of surveillance is subtler but equally important. It consists of keeping files, records, and case histories about people's work lives. Weber realized the importance of written records (nowadays usually computerized) in modern organizations but did not fully explore how they could be used to regulate behavior. Employee records usually provide complete work histories, including personal details and often character evaluations. Such records are used to monitor employees' behavior and assess recommendations for promotion. In many businesses, individuals at each level in the organization prepare annual reports on the performances of those in the level just below them. In schools, transcripts are used to monitor students' performance as they move through the organization. Records are kept on file for academic staff, too.

Organizations cannot operate effectively if employees' work is haphazard. In business firms, as Weber pointed out, people are expected to work regular hours. Activities must be consistently coordinated in time and space, something promoted by both the physical settings of organizations and the precise scheduling of detailed timetables, which regularize activities across time and space. In Foucault's words, timetables "efficiently distribute bodies" around the organization. They are a condition of organizational discipline because they organize, or schedule, the activities of large numbers of people. If a university did not observe a lecture timetable, for example, it would soon collapse into complete chaos.

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### CONCEPT CHECKS

1. **When groups become large, why does their intensity decrease but their stability increase?**
2. **What does the term *bureaucracy* mean?**
3. **Describe five characteristics of an ideal type of bureaucracy.**

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# Glossary

in-groups
: Groups toward which one feels particular loyalty and respect—the groups to which "we" belong.

out-groups
: Groups toward which one feels antagonism and contempt—"those people."

reference group
: A group that provides a standard for judging one's attitudes or behaviors.

dyad
: A group consisting of two persons.

triad
: A group consisting of three persons.

bureaucracy
: A type of organization marked by a clear hierarchy of authority and the existence of written rules of procedure and staffed by full-time, salaried officials.

ideal type
: A "pure type," constructed by emphasizing certain traits of a social item that do not necessarily exist in reality. An example is Max Weber's ideal type of bureaucratic organization.

formal relations
: Relations that exist in groups and organizations, as laid down by the norms, or rules, of the official system of authority.

informal relations
: Relations that exist in groups and organizations developed on the basis of personal connections; ways of doing things that depart from formally recognized modes of procedure.

surveillance

The supervising of the activities of some individuals or groups by others in order to ensure compliant behavior.

timetables

The means by which organizations regularize activities across time and space.

# 3 CONTEMPORARY RESEARCH ON NETWORKS AND GROUPS

**Learn what the term "McDonaldization" means. Understand how social networks can influence you in unexpected ways. Discover how the internet has transformed relationships between groups and social networks.**

## The "McDonaldization" of Society?

George Ritzer (1993) developed a vivid metaphor to express his view of the transformations in industrialized societies. He argues that we are witnessing the "McDonaldization" of society—"the process by which the principles of the fast-food restaurant are coming to dominate more and more sectors of American society as well as the rest of the world." Ritzer uses the four guiding principles of McDonald's restaurants—efficiency, calculability, uniformity, and control through automation—to show that our society is becoming ever more rationalized.

If you have visited a McDonald's in two different countries, you will have noticed that few differences exist between them. The interior decoration may vary slightly, and the language used will most likely differ, but the layout, the menu, the procedure for ordering, the uniforms, the tables, the packaging, and the "service with a smile" are virtually identical. The McDonald's experience is designed to be the same whether you are in Bogotá or Beijing. No matter where they are, McDonald's customers can expect quick service with a minimum of fuss and a standardized product that is reassuringly consistent. The McDonald's system is constructed to maximize efficiency and minimize human responsibility and involvement in the process. Except for certain key tasks, such as taking orders and pushing the Start and Stop buttons on cooking equipment, the restaurants' functions are highly automated and largely run themselves.

George Ritzer argues that more and more sectors of American society are adopting the principles of the fast-food industry. The Swedish furniture chain IKEA has applied McDonald's guiding principles to the furniture shopping experience with its low prices, predictable and controlled environment, and huge global presence.

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Ritzer argues that society as a whole is moving toward this highly standardized and regulated model. Many aspects of our daily lives, for example, now involve automated systems and computers instead of human beings. Email and texts are replacing letters and phone calls; e-commerce is threatening to overtake trips to the store; ATMs outnumber bank tellers; and prepackaged meals provide a quicker option than cooking. And if you have recently tried to call a large organization such as an airline, you know that it is almost impossible to speak to a human being. Automated touch-tone information services are designed to answer your requests; only in certain cases will you be connected to a live employee. Ritzer, like Weber before him, is fearful of the harmful effects of rationalization on the human spirit and creativity. He argues that McDonaldization is making social life more homogeneous, more rigid, and less personal.

# Personal Taste

Are our music choices a matter of personal taste or an example of conforming behavior? We tend to think of the music we listen to as an intensely personal choice made independently of the people around us and one that reflects our individual personalities and preferences. How much, however, do our group memberships and social networks shape our most personal of decisions, such as our aesthetic tastes?

Social scientists Matthew Salganik, Peter Dodds, and Duncan Watts (2006) conducted research to test the effects of the influence of social networks on musical choices. To do so, they created an artificial cultural market on a website named Music Lab. More than 14,000 participants registered with the site and were asked to listen to music by bands with which they were unfamiliar and then rate how much they liked the songs. If they liked the music, they could download songs. The researchers first divided their sample into two groups. Those in the control group were unable to use the website to see what other participants were listening to. Members of the experimental, or "treatment," group, or the "social influence" group, were able to see what other participants on the site were listening to as well as downloading. The social influence group was further placed into eight "worlds," and participants could see only the rankings and number of downloads of people in their world.

The researchers found that in the social influence groups, the most popular songs were more popular than those in the control group—that is, when participants knew what songs were favored by others, they were more likely to favor those songs themselves. The most popular song in each world was also different, providing further evidence of the importance of group influence. This suggests that the determinants of popularity in music were based on the listener's social "world." That is, the "intrinsic" quality of the music mattered less than the number of people in each world who were listening to the song, giving it high ratings, and downloading it.

The authors of the study described the effect of social networks as a "cumulative advantage" where "if one object happens to be slightly more popular than another at just the right point, it will tend to become more popular still. As a result, even tiny, random fluctuations can blow up, generating potentially enormous long-run differences among even indistinguishable competitors—a phenomenon that is similar in some ways to the famous 'butterfly effect' in chaos theory" (Watts, 2007). The butterfly effect proposes that small variations may produce large

variations in the long-term behavior of a system or organism. Salganik, Dodds, and Watts's study revealed the impact of our social networks, which are now increasingly virtual networks, on our music decisions.

Studying how consumers make decisions is a part of a much deeper sociological tradition that is concerned with conformity, propaganda, and the question of how leaders have persuaded whole populations to take part in horrific deeds. The Holocaust, which claimed the lives of more than 6 million Jews and millions of others, left many social scientists searching to understand how, why, and under what conditions ordinary people would conform to authority. Many students who have seen or read about Stanley Milgram's laboratory experiments or the "make-believe jail" experiment (discussed in Chapter 2) tend to think that they would not conform to the demands of an authority figure as the study participants did. Yet the Music Lab study reveals how social environments affect our behavior and how we all, at times, conform to the movements of larger social groups, even when it comes to something as personal as the music we like.

# Obesity

One major public health problem that sociologists have studied in recent years is obesity. In the United States today, the number of obese people has been growing steadily. More than 40 percent of American adults are obese, as well as 20.7 percent of children and 22 percent of adolescents (Centers for Disease Control and Prevention, 2022a; Stierman et al., 2021). Although obesity may have a significant biological component, significant social factors should not be ignored. Most obviously, sociologists have discovered that particular communities, sometimes known as "food deserts," are short of healthy food options. Poor inner-city neighborhoods tend to have fewer grocery stores and health food outlets, and more fast-food restaurants, than do wealthier neighborhoods (Walker et al., 2010). More controversial has been the finding by sociologist Nicholas Christakis of Harvard Medical School and social scientist James Fowler (2007) of the University of California, Davis, that having fat friends can make you fat.

Their study, titled "The Spread of Obesity in a Large Social Network over 32 Years," published in *The New England Journal of Medicine*,

showed that obesity was "contagious." Christakis and Fowler found that if one person became obese, then persons closely connected to them had a greater chance of becoming obese. If a person once considered a "friend" became obese, then one's own chances of becoming obese increased by 57 percent. However, a mere neighbor's weight change had no effect on one's body weight.

The media were eager to report the findings of the Christakis and Fowler study. It was the first-ever study to examine the ways that one's social networks affected one's body weight. The researchers had access to a unique data source that allowed them to ask questions such as "How do one's friends affect one's weight?" and "Does it matter if one's friends live nearby or far away?" Christakis and Fowler analyzed data from a sample of 12,067 adults who were followed over a period of 32 years, from 1971 to 2003. These adults were participants in the renowned Framingham Heart Study. The data source revealed the study participants' friends, spouses, siblings, and neighbors. It also obtained information on each person's address and body weight at each interview point.

Because of their unique data and rigorous methodology, the researchers could rule out competing explanations for their findings. For example, because they had data from many time points throughout the 32-year study, they could ascertain the order in which events unfolded. It was not the case that obese people would simply seek out similar-weight people as friends. Rather, Christakis noted, there was a "direct, causal relationship." Christakis and Fowler also found that it didn't matter whether one's friend lived nearby or far away; they found that a friend who lived 500 miles away had just as powerful an impact on one's own weight as a friend who lived across the street.

The study also found that the "contagion" of body weight was not due to the fact that friends might share lifestyles, hobbies, and dietary choices—such as eating large meals together or discouraging one another from exercising. If it's not the "birds of a feather flock together" explanation or "gluttony loves company" explanation, what accounts for the spread of body weight? The authors believe that their study is a testimony to the power of social norms. People develop their ideas about what is an acceptable body type by looking at the people around them. Christakis stated: "People come to think that it is okay to be bigger since those around them are bigger, and this sensibility spreads."

However, the researchers were adamant that Americans should not come away thinking that it is wise or healthy to abandon their obese friends. Rather, Christakis noted, it is good for one's health to have friends, period: "It is unlikely that severing ties with people on the basis of any of their particular traits—as some have supposed that our results might suggest—would necessarily be beneficial." Instead, they concluded that overweight or obese people could befriend a healthy-weighted person and then allow themselves to be influenced by the positive model set by the healthy-weight friend.

Other researchers have criticized their methods. Lyons (2011) and other statisticians have argued in scathing critiques that the researchers did not properly use their statistics and that most of the association was due to error. However, even the most skeptical critics of Christakis and Fowler's work do acknowledge that human health and health behaviors are powerfully shaped by one's peers and significant others, although they would not go so far as to say that it is "contagion," instead suggesting that people associate with others like themselves, or they may model and influence each other's behaviors.

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**CONCEPT CHECKS**

1. **What does Ritzer mean by the concept "McDonaldization" of society?**
2. **What evidence do Watts and colleagues have for their claims about social influence on personal taste?**
3. **How do Christakis and Fowler explain the spread of obesity through social networks? Why are some researchers critical of their findings?**

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# 4 UNANSWERED QUESTIONS

**Learn what Robert Michels meant by the iron law of oligarchy. Consider how information and communication technology is transforming organizations.**

## Is Democracy Meaningless in the Face of Increasingly Powerful Bureaucratic Organizations?

Even in democracies such as the United States, government organizations hold enormous amounts of information about us, from records of our birth dates, schools attended, and jobs held, to data on income used for tax collecting and information for issuing driver's licenses and allocating Social Security numbers. Because we don't have access to the files of most government agencies, such surveillance activities can infringe on the principle of democracy.

The diminishing of democracy with the advance of modern forms of organization worried Weber a great deal (see also Chapter 13). What especially disturbed him was the prospect of rule by faceless bureaucrats. After all, Weber reasoned, bureaucracies are necessarily specialized and hierarchical. Those near the bottom of the organization inevitably carry out mundane tasks and have no power over what they do; power resides with those at the top. Weber's student Robert Michels (1911/1967) coined the phrase "Who says organization, says oligarchy." It has come to refer to this loss of power, in large-scale organizations and, more generally, in a society dominated by organizations. Michels called this concept the iron law of oligarchy. Oligarchy means "rule by the few." According to Michels, the flow of power toward the top is an inevitable part of an increasingly bureaucratized world—hence the "iron law."

Was Michels right? It surely is true that large-scale organizations involve the centralizing of power. Yet there is reason to believe that the iron law of oligarchy is not quite as hard-and-fast as Michels claimed. The

connections between oligarchy and bureaucratic centralization are more ambiguous than he supposed.

First, unequal power is not just a function of size. Marked differences in power exist even in modest-sized groups. In a small business, for instance, in which the activities of employees are directly visible to the directors, much tighter control might be exerted than in larger organizations. As organizations expand in size, power relationships often become looser. Those at the middle and lower levels may have little influence over policies forged at the top. However, because of the specialization and expertise involved in bureaucracy, people at the top may lose control over many of the administrative decisions made by those lower down.

Second, in many modern organizations, power is often delegated downward from superiors to subordinates. The heads of huge corporations are so busy coordinating different departments, coping with crises, and analyzing budget and forecast figures that they have little time for original thinking. Consequently, they delegate consideration of policy issues to others, whose task is to develop proposals. Many corporate leaders admit that, for the most part, they simply accept the conclusions given to them.

# How Are Late-Modern Organizations Reinventing Themselves?

For quite a long while in Western societies, Weber’s model, closely mirrored by Foucault’s, held fast. In government, hospital administration, universities, and business organizations, bureaucracy was dominant. Even though, as Peter Blau showed, informal social groups always develop in bureaucratic settings, and are in fact effective, it seemed as though the future might be what Weber had anticipated: constantly increasing bureaucratization.

Bureaucracies still exist in the West, but Weber’s idea that a clear hierarchy of authority, with power and knowledge concentrated at the top, is the only way to run a large organization is starting to look archaic. Numerous organizations are overhauling themselves to become less, rather than more, hierarchical.

In the 1960s, Burns and Stalker (1961) concluded that traditional bureaucratic structures could stifle innovation and creativity in cutting-edge industries. In today's electronic economy, few would dispute these findings. Departing from rigid vertical command structures, many organizations are turning to "horizontal," collaborative models to become more responsive to fluctuating markets. In this section, we examine some of the forces behind these shifts, including globalization and information technology, and consider some of the ways in which late-modern organizations are reinventing themselves.

Anyone who draws money from a bank or buys an airline ticket depends on a computer-based communication system. Because data can be processed instantaneously in any part of the world linked to such a system, there is no need for physical proximity among those involved. As a result, information and communication technology has allowed many companies to reengineer their organizational structures (Attaran, 2004; Bresnahan et al., 2002; Castells, 2000, 2001; Kanter, 1991; Kobrin, 1997; Zuboff, 1988). Such changes, while good for efficiency, can have negative as well as positive consequences for the individuals within the organization.

For example, one company found the sales of some of its products falling and needed to reduce costs. The traditional route would have been to lay off staff. Instead, the firm set up as independent consultants those who would have been laid off. The company then bought back a substantial proportion of the former employees' working time for a number of years but also left them free to work for other clients. The idea was that the new arrangement would provide the corporation with access to the skills of its former employees but at a cheaper rate because it no longer provided office space or company benefits (pension, health insurance, and so on). The former employees, in turn, had the opportunity to build up their own businesses. Initially, at least, the arrangement has worked well for both parties. In such a scheme, though, the burden is on the former employees, because they have to compensate for the loss of benefits with new business.

This is just one example of how large organizations have become more decentralized and flexible (Burris, 1998). Another example is the rise of telecommuting. A good deal of office work can now be carried out by remote workers using the internet and other mobile technologies, such as

smartphones and tablets, to work at home or somewhere other than their employer's primary office. In 2022, 49 percent of workers spent some time working remotely, while 29 percent of employees worked remotely all the time (Wigert & Agrawal, 2022). People are also spending more time working remotely: In 2017, nearly a third of remote workers worked outside the office 80 percent or more of the time, up from about a quarter of workers in 2012 (Gallup, 2017).

We see the highest proportions of remote workers in industries such as transportation and computer/information systems as well as arts, design, entertainment, and media. Remote workers are typically older (50+) and college educated, and they work in salaried professional or managerial positions.

To reduce costs and increase productivity, large firms may set up information networks connecting employees who work from home with the main office. In 2009, the computer company Cisco released a study of its own employees, which found that telecommuting significantly increased productivity, work-life flexibility, and job satisfaction. The company reportedly accrued annual savings of $277 million in productivity by allowing employees to telecommute and telework. In addition to productivity gains, Cisco estimates that its telework and telecommuting policies have resulted in a reduction of the company's carbon footprint, saving approximately 47,320 metric tons of greenhouse gas emissions due to avoided travel (Cisco, 2009). It is estimated that if all the workers whose jobs are compatible with working at home could do so even half of the time, there would be a 75 percent reduction of cars on the road and greenhouse gas emission would go down (Global Workplace Analytics, 2021).

One reason that telecommuting increases productivity is that it eliminates commuting time, thereby permitting greater concentration of energy on work. Hartig, Johansson, and Kylin (2003) found that telecommuters actually spend more time on paid work when working at home than their counterparts do when working in the office. However, these new work arrangements are not perfect. First, the employees lose the human side of work; computer monitors are no substitute for face-to-face interaction with colleagues and friends at work. Second, telecommuters experience isolation, distraction, and conflicting demands of work and home responsibilities (Ammons & Markham, 2004). In

addition, female telecommuters face more stress from increased housework and child-care responsibilities (Ammons & Markham, 2004; Olson, 1989; Olson & Primps, 1984). In recent years, however, some large corporations, including Best Buy, Yahoo, and Bank of America, have opted to buck this trend in remote work by terminating or scaling back their work-from-home policies, citing an effort to boost collaboration and communication (Gallup, 2017).

On the other hand, management cannot easily monitor employees working off-site (Dimitrova, 2003; Kling, 1996). While this lack of supervision may create problems for employers, it allows employees greater flexibility in managing their nonwork roles, thus contributing to increased worker satisfaction (Davis & Polonko, 2001). Telecommuting also creates new possibilities for older and disabled workers to remain independent, productive, and socially connected (Bricourt, 2004). Finally, telecommuting is contributing to new trends in housing and residential development as space for home offices becomes more of a priority. With people able to work at a distance from city centers, residential development no longer needs to be tied to commuting practices.

While computerization has resulted in increased flexibility and a reduction in hierarchy, it has created a two-tier occupational structure composed of technical "experts" and less-skilled production or clerical workers. In these restructured organizations, jobs have been redefined more in terms of technical skill than rank or position. For expert professionals, traditional bureaucratic constraints are relaxed to allow for creativity and flexibility (Burris, 1993). Although professionals benefit from this expanded autonomy, computerization makes production and service workers more visible and vulnerable to supervision (Wellman et al., 1996; Zuboff, 1988). For instance, organizations can now monitor work patterns to the point where they can count the number of seconds per phone call or keystrokes per minute, which in turn can lead to higher levels of stress for employees.

Granted, workplace computerization does have some positive effects. It has made some of the mundane tasks of clerical jobs more interesting. It can also promote social networking (Wellman et al., 1996). Office computers can be used for recreation; private exchanges with coworkers, friends, or family; and work-related interaction. And, as in the case of

telecommuting, computerization can contribute to greater flexibility for workers to manage both their personal and professional lives.

# Can the Traditional Organization Survive?

Traditionally, identifying the boundaries of organizations has been fairly straightforward. Until recently, organizations were generally located in defined physical spaces, such as an office building, a suite of rooms, or, in the case of a hospital or university, a campus. In addition, the mission or tasks of an organization were usually clear-cut. A central feature of bureaucracies, for example, was adherence to a defined set of responsibilities and procedures for carrying them out. Weber's bureaucracy was a self-contained unit that intersected with outside entities at limited and designated points.

We have already seen how the physical boundaries of organizations are being broken down by the capacity of information technology to transcend countries and time zones. The same process is affecting the work that organizations do and the way in which it is coordinated. Many organizations no longer operate as independent units. A growing number are finding that they run more effectively when they are part of a web of complex relationships with other organizations and companies. No longer is there a clear dividing line between the organization and outside groups. Globalization, information technology, and trends in occupational patterns mean that organizational boundaries are more open and fluid than they once were.

In *The Rise of the Network Society*, Manuel Castells (1996) argues that the "network enterprise" is the organizational form best suited to a global, informational economy. By this he means that it is increasingly impossible for organizations (large corporations or small businesses) to survive if they are not part of a network. What enables networking to occur is the growth of information technology, whereby organizations around the world can contact one another and coordinate joint activities through an electronic medium. Castells cites several examples of organizational networking that originated in diverse cultural and institutional contexts but nevertheless all represent what he calls

“different dimensions of a fundamental process”—the disintegration of the traditional, rational bureaucracy.

Organizations can function as networks via the powerful alliances formed between top companies. Increasingly, the large corporation is less and less a big business and more an “enterprise web”—a central organization that links together smaller firms. IBM, for example, used to be a highly self-sufficient corporation, wary of partnerships with others. Yet in the 1980s and early 1990s, IBM joined with dozens of U.S.-based companies and more than 80 foreign-based firms to share strategic planning and cope with production problems.

Decentralization is another process that contributes to organizations functioning as networks. When change becomes more profound and more rapid, highly centralized Weberian-style bureaucracies are too cumbersome and too entrenched in their ways to cope. Stanley Davis (1988) argues that as business firms and other organizations come to be networks, they go through a process of decentralization by which power and responsibility are devolved downward throughout the organization, rather than remaining concentrated at the top.

Networked organizations offer at least two advantages over more bureaucratic ones: They can foster the flow of information, and they can enhance creativity. As we’ve seen, bureaucratic hierarchy can impede the flow of information: One must go through the proper channels, fill out the right forms, and avoid displeasing people in higher positions. These processes not only hinder the sharing of information but also stifle creative problem solving. In networked organizations, when a problem arises, instead of writing a memo to your boss and waiting for a reply, you can simply pick up the phone or dash off an email to the person responsible for working out a solution. As a result, members of networked organizations learn more easily from one another than do bureaucrats. It is therefore easier to solve routine dilemmas and to develop innovative solutions to all types of problems (Hamel, 1991; Powell & Brantley, 1992; Powell et al., 1996).

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## CONCEPT CHECKS

1. **What is the iron law of oligarchy?**

2. **How are technology and globalization transforming traditional organizations?**
3. **What is the difference between networked and bureaucratic organizations?**

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# Glossary

iron law of oligarchy
: A term coined by Max Weber's student Robert Michels meaning that large organizations tend toward centralization of power, making democracy difficult.

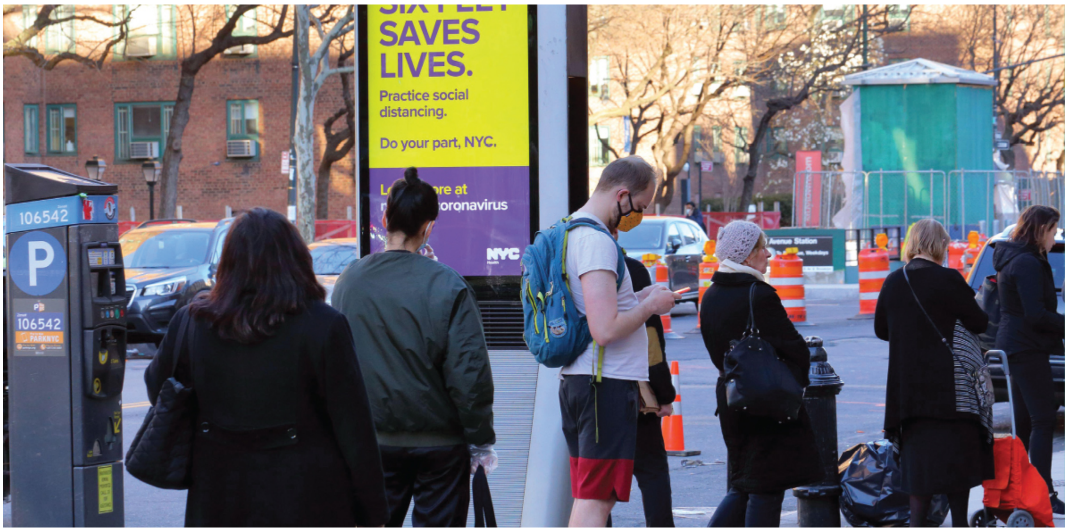
oligarchy
: Rule by a small minority within an organization or society.

information and communication technology
: Forms of technology based on information processing and requiring microelectronic circuitry.

# THE BIG PICTURE

# Chapter 6

## Networks, Groups, and Organizations

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**Exercises:** Thinking Sociologically

1. According to Georg Simmel, what are the primary differences between dyads and triads? Explain, according to his theory, how the addition of a child would alter the relationship between a husband and wife. Does the theory fit this situation?
2. The advent of the internet, cloud computing, and the computerization of the workplace may change our organizations and relationships with coworkers. Explain how you see modern organizations changing with the adoption of newer information technologies.

# BASIC CONCEPTS p. 172

## Learning Objectives

Learn about the variety and characteristics of networks and groups, as well as the effect they have on individual behavior. Know how to define

an organization and understand how organizations developed over the last two centuries.

## Terms to Know

networks • social group • social aggregate • social category • primary groups • secondary groups • organization • formal organization

## Concept Checks

1. According to Granovetter, what are the benefits of weak ties? Why?
2. What is the difference between social aggregates and social groups? Give examples that illustrate this difference.
3. Describe the main characteristics of primary and secondary groups.
4. What role do organizations play in contemporary society?

# THEORIES OF NETWORKS, GROUPS, AND ORGANIZATIONS p. 179

## Learning Objectives

Learn Max Weber's theory of organizations and view of bureaucracy. Understand the importance of the physical setting of organizations and Michel Foucault's theory of surveillance. Understand the importance of social networks and the advantages they give some people.

## Terms to Know

in-groups • out-groups • reference group • dyad • triad • bureaucracy • ideal type • formal relations • informal relations • surveillance • timetables

## Concept Checks

1. When groups become large, why does their intensity decrease but their stability increase?
2. What does the term bureaucracy mean?
3. Describe five characteristics of an ideal type of bureaucracy.

# CONTEMPORARY RESEARCH ON NETWORKS AND GROUPS p. 189

## Learning Objectives

Learn what the term "McDonaldization" means. Understand how social networks can influence you in unexpected ways. Discover how the internet has transformed relationships between groups and social networks.

## Concept Checks

1. What does Ritzer mean by the concept "McDonaldization" of society?
2. What evidence do Watts and colleagues have for their claims about social influence on personal taste?
3. How do Christakis and Fowler explain the spread of obesity through social networks? Why are some researchers critical of their findings?

# UNANSWERED QUESTIONS p. 192

## Learning Objectives

Learn what Robert Michels meant by the iron law of oligarchy. Consider how information and communication technology is transforming organizations.

## Terms to Know

iron law of oligarchy • oligarchy • information and communication technology

## Concept Checks

1. What is the iron law of oligarchy?
2. How are technology and globalization transforming traditional organizations?
3. What is the difference between networked and bureaucratic organizations?

# Glossary

networks
: Sets of informal and formal social ties that link people to each other.

social group
: A collection of people who regularly interact with one another on the basis of shared expectations concerning behavior and who share a sense of common identity.

social aggregate
: A simple collection of people who happen to be together in a particular place but do not significantly interact or identify with one another.

social category
: People who share a common characteristic (such as gender or occupation) but do not necessarily interact or identify with one another.

primary groups
: Groups characterized by intense emotional ties, face-to-face interaction, intimacy, and a strong, enduring sense of commitment.

secondary groups
: Groups characterized by large size and by impersonal, fleeting relationships.

organization
: A large group of individuals with a definite set of authority relations. Many types of organizations exist in industrialized societies, influencing most aspects of our lives. While not all organizations are bureaucratic, there are close links between the development of organizations and bureaucratic tendencies.

formal organization

A group that is rationally designed to achieve its objectives, often by means of explicit rules, regulations, and procedures.

in-groups

Groups toward which one feels particular loyalty and respect—the groups to which "we" belong.

out-groups

Groups toward which one feels antagonism and contempt—"those people."

reference group

A group that provides a standard for judging one's attitudes or behaviors.

dyad

A group consisting of two persons.

triad

A group consisting of three persons.

bureaucracy

A type of organization marked by a clear hierarchy of authority and the existence of written rules of procedure and staffed by full-time, salaried officials.

ideal type

A "pure type," constructed by emphasizing certain traits of a social item that do not necessarily exist in reality. An example is Max Weber's ideal type of bureaucratic organization.

formal relations

Relations that exist in groups and organizations, as laid down by the norms, or rules, of the official system of authority.

informal relations

Relations that exist in groups and organizations developed on the basis of personal connections; ways of doing things that depart from formally recognized modes of procedure.

surveillance

The supervising of the activities of some individuals or groups by others in order to ensure compliant behavior.

timetables

The means by which organizations regularize activities across time and space.

iron law of oligarchy

A term coined by Max Weber's student Robert Michels meaning that large organizations tend toward centralization of power, making

democracy difficult.

oligarchy

Rule by a small minority within an organization or society.

information and communication technology

Forms of technology based on information processing and requiring microelectronic circuitry.

# 7 Deviance, Crime, and Punishment

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Some members of the Mafia commit crimes in order to

1. **terrorize other citizens.**

2. **become respectable members of society.**
3. **extort money.**
4. **destroy communities and the government.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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**LEARNING OBJECTIVES**

1. Basic Concepts Learn how we define deviance and how it is related to social power and social class. Recognize the ways in which we encourage conformity.
2. Society and Crime: Sociological Theories Know the leading sociological theories of crime and how each is useful in understanding deviance.
3. Research on Crime and Deviance Today Recognize the usefulness and limitations of crime statistics. Understand that some individuals or groups are more likely than others to commit, or be the victims of, crime. Familiarize yourself with some of the varieties of crime.
4. Unanswered Questions Explore the different explanations for the decline in overall crime between the 1990s and present. Think about the best solutions to reduce crime. Consider the ways in which individuals and governments can reduce crime.

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If you have ever watched a film like *The Godfather* or *Goodfellas*, you probably think of mobsters as quite exotic. Like drug dealers or vagrants, members of the Mafia appear to us as social deviants, individuals who don't conform to normal standards. Yet, while some members of the Mafia are violent criminals who could never achieve a typical existence, most mobsters ultimately end up exiting the world of crime and living respectably over the course of their lives.

This essential fact was discovered by Francis Ianni in a classic study that made many people question their basic assumptions about the mob. Ianni had grown up in a Mafia family, and he wrote his dissertation about the relatives whom he had known since childhood. Central to Ianni's work is the claim that Mafia members commit crimes to engage in a "quiet and determined push toward respectability" (Gladwell, 2014). Like other American immigrants, the Mafia members he studied sought to realize the American dream but found themselves barred from many of the

resources and institutions available to other citizens. Crime became the primary vehicle through which Mafia families moved into the mainstream of American society. But once they had the money to start their own legitimate businesses, they did move on.

While members of the Lupollo clan may have started as “rule breakers” working as bootleggers in the Prohibition era, Ianni notes that of the 42 members of the Lupollo clan, only 4 were engaged in criminal activities four decades later in 1972, with the majority of profits from illegal activities re-invested into legal enterprises. Over time, the family increasingly separated their illegal businesses from their legal businesses. By the end of the twentieth century, families like the Lupollo clan had become fully integrated members of mainstream society, moving from rule breakers to conformists. Further, even when engaged in illegal activities, Mafia members maintained a clearly organized leadership structure and followed strict codes of family loyalty, mutual aid, and secrecy. In this way, the Mafia also acted as rule creators.

We have learned in previous chapters that social life is governed by norms that define some kinds of behavior as appropriate in particular contexts and others as inappropriate. Norms are principles or rules that people are expected to observe; they represent the “dos and don’ts” of society. Ianni found that while members of the Mafia may break some of the rules that many of us follow in mainstream society, they also follow their own set of norms to regulate behavior. Ianni describes the business of the Lupollo clan as governed by a strict set of rules about family loyalty and mutual aid. As such, members of the Mafia may have different definitions of who is “deviant” and who is “conformist.”

Actually, we are all rule breakers as well as conformists. We are all also rule creators. For example, most American drivers may break the law on the freeways, but in fact, they’ve developed informal rules superimposed on the legal rules. When the legal speed limit is 65 mph, most drivers don’t go above 75 mph or so, and they drive more slowly through urban areas. As a result, when we study deviant behavior, we must consider which rules people are observing and which ones they are breaking. Nobody breaks all rules, just as no one conforms to all rules. The behaviors that are defined as deviant may even change over time.

The study of deviant behavior reveals that none of us is as normal as we think. It also shows that people whose behavior appears

incomprehensible or alien can be seen as rational beings when we understand why they act as they do. Indeed, if we can understand members of the Mafia as citizens working in pursuit of respectability, we might also consider how contemporary gang members, drug dealers, or homeless people might also be following a stable set of norms that may differ from our own—and that they may even aspire to live by a set of norms similar to our own.

# Glossary

norms
: Rules of conduct that specify appropriate behavior in a given range of social situations. A norm either prescribes a given type of behavior or forbids it. All human groups follow definite norms, which are always backed by sanctions of one kind or another, varying from informal disapproval to physical punishment.

# 1 BASIC CONCEPTS

**Learn how we define deviance and how it is related to social power and social class. Recognize the ways in which we encourage conformity.**

The study of deviance, like other fields of sociology, directs our attention to social power, which encompasses gender, race, and social class. When we look at deviance from, or conformity to, social rules or norms, we always have to consider the question “Whose rules?” As we shall see, social norms are strongly influenced by divisions of power and class.

## What Is Deviance?

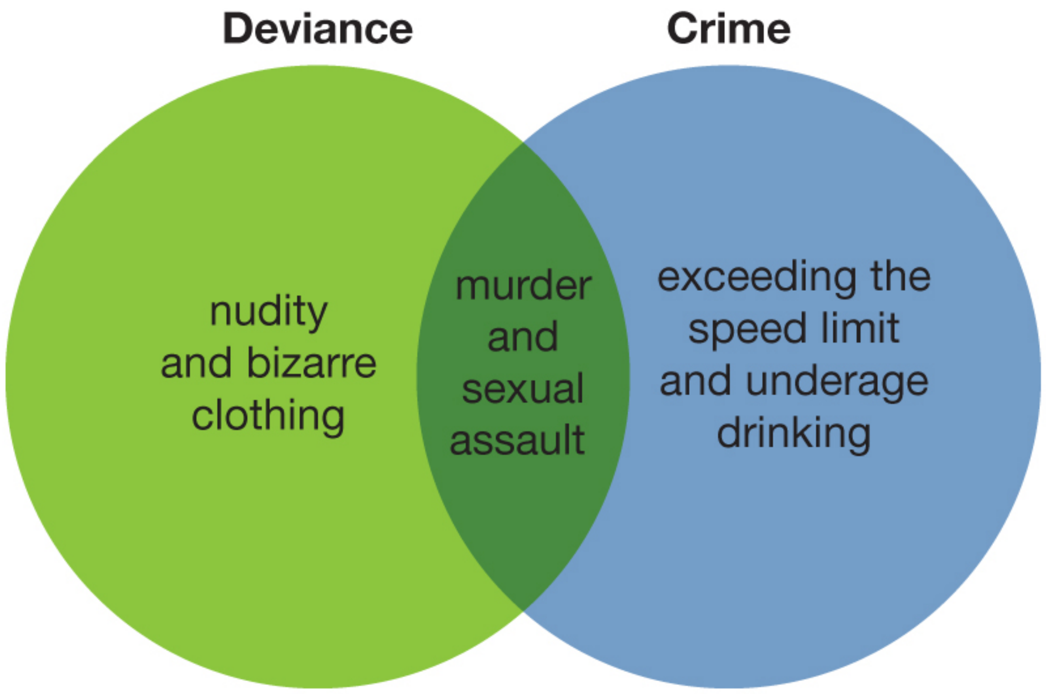
Deviance may be defined as nonconformity to a set of norms that a significant number of people in a community or society accept. No society can be divided simply between those who deviate from norms and those who conform to them because most people sometimes transgress generally accepted rules of behavior. Although a large share of all deviant behavior (such as committing assault or murder) is also criminal and violates the law, many deviant behaviors—ranging from making bizarre fashion choices to joining a religious cult—are not criminal. By the same token, many behaviors that are technically “crimes,” such as underage drinking or exceeding the speed limit, are not considered deviant because they are quite normative (see Figure 7.1). Sociologists tend to focus much of their research on behaviors that are both criminal and deviant because such behaviors have importance for the safety and well-being of our nation.

Although most of us associate the word *deviant* with behaviors that we view as dangerous or unsavory, assessments of deviance are truly in the eye of the beholder, as our next example will illustrate. Kevin Mitnick has been described as the “world’s most celebrated computer hacker.” To computer hackers everywhere, Mitnick is a pathbreaking genius whose five-year imprisonment in a U.S. penitentiary was unjust and unwarranted—proof of how misunderstood computer hacking has become with the spread of information technology. To U.S. authorities

and high-tech corporations, Mitnick is one of the world's most dangerous men. A recent study found that hackers—the leading cause of data breaches—were responsible for 45 percent of data breaches in 2018 (Verizon, 2020). Mitnick was captured by the Federal Bureau of Investigation (FBI) in 1995 and later convicted of downloading source code and stealing software allegedly worth millions of dollars from companies such as Motorola and Sun Microsystems. As a condition of his release from prison in January 2000, Mitnick was barred from using any communications technology other than a landline telephone. He successfully fought this legal decision and gained access to the internet. He now is a consultant and best-selling author who teaches others about computer security (Mitnick & Simon, 2011).

Figure 7.1

**INTERSECTION OF DEVIANCE AND CRIME**

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Over the past decade or so, hackers have gradually evolved from a little-noticed population of computer enthusiasts to a much-reviled group of deviants who are believed to threaten the very stability of the information age. Yet, according to Mitnick and others in the hacker community, such depictions could not be further from the truth. Hackers are quick to point out that most of their activities are not criminal. Rather, they are

primarily interested in exploring the edges of computer technology, trying to uncover loopholes and discover the extent to which it is possible to penetrate other computer systems. Once they discover flaws, the "hacker ethic" demands that they share information publicly. Many hackers have even served as consultants for large corporations and government agencies, helping them defend their systems against outside intrusion.

Deviance does not refer only to individual behavior; it concerns the activities of groups as well. Heaven's Gate was a religious group whose beliefs and practices were different from those of the majority of Americans. The cult was established in the early 1970s when Marshall Herff Applewhite made his way around the West and Midwest of the United States preaching his beliefs, ultimately advertising on the internet in the early 1990s his belief that civilization was doomed and the only way people could be saved was to kill themselves so their souls could be rescued by a UFO. On March 26, 1997, 39 members of the cult followed his advice in a mass suicide at a wealthy estate in Rancho Santa Fe, California.

The Heaven's Gate cult represents an example of a deviant subculture. Its members were able to survive fairly easily within the wider society, supporting themselves by running a website business and using the internet to recruit new members. They had plenty of money and lived together in an expensive home in a wealthy California suburb.

# Norms and Sanctions

We most often follow social norms because, as a result of socialization, we are used to doing so. Individuals become committed to social norms through interactions with people who obey the law. Through these interactions, we learn self-control. The more numerous these interactions, the fewer opportunities we have to deviate from conventional norms. Over time, the longer we interact in conventional ways, the more we stand to lose by not conforming (Gottfredson & Hirschi, 1990).

All social norms carry sanctions that promote conformity and protect against nonconformity. A sanction is any reaction from others that is meant to ensure that a person or group complies with a given norm.

Sanctions may be positive (the offering of rewards for conformity) or negative (punishment for behavior that does not conform). They can also be formal or informal. Formal sanctions are applied by a specific group or agency to ensure that a particular set of norms is followed. Informal sanctions are less organized and more spontaneous reactions to nonconformity, such as when a student's friends teasingly accuse him of working too hard or being a nerd if he spends an evening studying rather than going to a party.

Courts and prisons represent the main types of formal sanctions in modern societies. The police are charged with bringing offenders to trial and possibly to imprisonment. Laws are norms defined by governments as principles their citizens must follow; sanctions are used against people who do not conform to those principles. Where there are laws, there are also crimes because crime constitutes any type of behavior that breaks a law.

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**CONCEPT CHECKS**

1. **How do sociologists define deviance?**
2. **Is all crime deviant? Is all deviance criminal? Why?**
3. **Contrast positive and negative sanctions.**

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# Glossary

deviance
: Modes of action that do not conform to the norms or values held by most members of a group or society. What is regarded as deviant is as variable as the norms and values that distinguish different cultures and subcultures from one another. Forms of behavior that are highly esteemed by one group may be regarded negatively by others.

deviant subculture
: A subculture whose members hold values that differ substantially from those of the majority.

sanction
: A mode of reward or punishment that reinforces socially expected forms of behavior.

laws
: Rules of behavior established by a political authority and backed by state power.

crime
: The result of any action that contravenes the laws established by a political authority.

# 2 SOCIETY AND CRIME: SOCIOLOGICAL THEORIES

**Know the leading sociological theories of crime and how each is useful in understanding deviance.**

Any satisfactory account of the nature of crime must be sociological because what crime is depends on the social institutions of a society. Contemporary sociological thinking about crime emphasizes that definitions of conformity and deviance vary based on one's social context. Modern societies contain many subcultures, and behavior that conforms to the norms of one subculture may be regarded as deviant outside it; for instance, a member of a gang may feel strong pressure to prove himself by stealing a car. Moreover, wide divergences of wealth and power in society greatly influence criminal opportunities for different groups. Theft and burglary, not surprisingly, are carried out mainly by people from the poorer segments of the population; embezzlement and tax evasion are by definition limited to persons in positions of some affluence.

## Functionalist Theories

Functionalist theories argue that crime occurs when the aspirations of individuals and groups do not coincide with available opportunities. The disparity between desires and fulfillment will lead to deviant behavior.

### Crime and Anomie: Durkheim and Merton

Émile Durkheim and Robert Merton argued that deviant behavior is the result of the structure of modern societies. Durkheim's notion of anomie suggests that in modern societies, traditional norms and standards become undermined without being replaced by new ones. Anomie exists when there are no clear standards to guide behavior in a given area of social life. Under such circumstances, Durkheim believed, people feel

disoriented and anxious; anomie therefore heightens dispositions to suicide.

Durkheim saw crime and deviance as inevitable and necessary elements in modern societies. According to Durkheim, people in the modern age are less constrained than they were in traditional societies. Because there is more room for individual choice in the modern world, inevitably there will be some nonconformity. Durkheim recognized that modern society would never be in complete consensus about the norms and values that govern it.

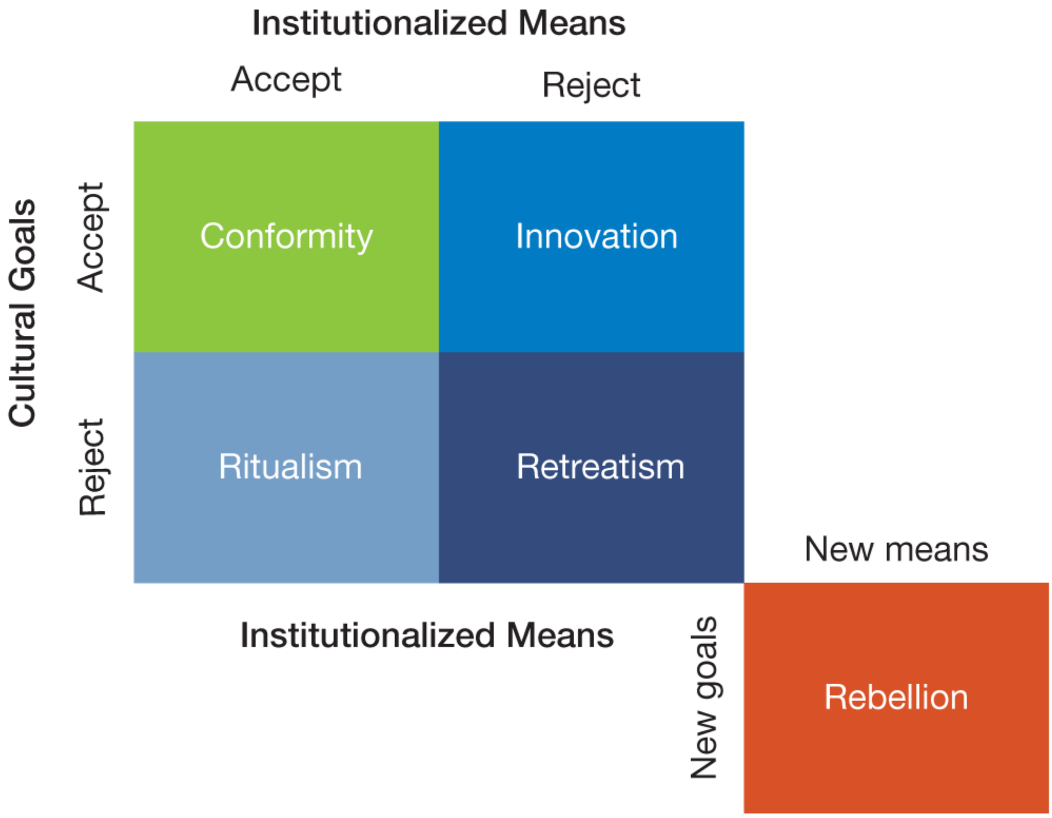
Deviance is also necessary for society, according to Durkheim. First, deviance has an adaptive function: By introducing new ideas and social challenges, deviance brings about change. Second, deviance promotes boundary maintenance between "good" and "bad" behavior. A criminal event can provoke a collective response that heightens group solidarity and clarifies social norms. For example, residents of a neighborhood facing a problem with drug dealers might join together in the aftermath of a drug-related shooting and commit themselves to maintaining the area as a drug-free zone.

Durkheim's ideas on crime and deviance helped shift attention from explanations that focused on the problems of individuals to explanations focused on social forces. His notion of anomie was applied by the American sociologist Robert K. Merton (1957), who located the source of crime within the very structure of American society.

Merton modified the concept of anomie to refer to the strain put on individuals' behavior when accepted norms conflict with social reality. In American society—and, to some degree, in other industrial societies—values emphasize material success through self-discipline and hard work. Accordingly, it is believed that people who work hard can succeed regardless of their starting point in life. This idea is not in fact valid because most disadvantaged people have limited or no conventional opportunities for advancement, such as high-quality education. Yet those who do not "succeed" are condemned for their apparent inability to make material progress. In this situation, there is pressure to get ahead by any means, legitimate or illegitimate. According to Merton, then, deviance is a by-product of economic inequalities.

Figure 7.2

**MERTON'S DEVIANCE TYPOLOGY**




Merton split people into five possible types based on how they responded to the tensions between socially endorsed values and the limited means of achieving them (see Figure 7.2): *Conformists* accept generally held values and the conventional means of realizing them, regardless of whether they meet with success. Most of the population falls into this category. *Innovators* accept socially approved values but use illegitimate or illegal means to follow them. We might consider members of the Mafia to be innovators. While most Mafia members want to lead respectable lives by entering into mainstream society, they need to acquire wealth through illegal activities to do so (Gladwell, 2014). *Ritualists* conform to socially accepted standards, though they have lost sight of their underlying values. They compulsively follow rules for their own sake. A ritualist might dedicate herself to a boring job, even though it has no career prospects and provides few rewards. *Retreatists* have abandoned the competitive outlook, rejecting both the dominant values and the approved means of achieving them. An example would be members of a self-supporting commune. Finally, *rebels* reject both the existing values and the means of achieving them but work to substitute

new ones and reconstruct the social system. The members of radical political and religious groups, such as the Heaven's Gate cult, fall into this category.

Merton's writings addressed one of the main puzzles in the study of criminology: At a time when society as a whole was becoming more affluent, why did crime rates continue to rise? By emphasizing the contrast between rising aspirations and persistent inequalities, Merton identified a sense of relative deprivation, or the recognition that one has less than one's peers, as an important element in deviant behavior.

## Subcultural Explanations

Later researchers examined subcultural groups that adopt norms that encourage or reward criminal behavior. Like Merton, Albert Cohen saw the contradictions within American society as the main cause of crime. But while Merton emphasized individual deviant responses, Cohen saw the responses occurring collectively through subcultures. In *Delinquent Boys* (1955), Cohen argues that frustrated boys in the lower working class often join delinquent subcultures, such as gangs. These subcultures reject middle-class values and replace them with norms that celebrate nonconformity and deviance, such as delinquency.

Richard A. Cloward and Lloyd E. Ohlin (1960) agreed with Cohen that most delinquent youths emerge from the lower working class. But they argued that such gangs arise in subcultural communities where the chances of achieving success legitimately are slim, as among deprived ethnic minorities. Cloward and Ohlin's work emphasized connections between conformity and deviance: Individuals follow rules when they have the opportunity to do so and break rules when they do not. As a result, they develop subcultures with deviant values in response to a lack of legitimate opportunities for success as defined by the wider society. This lack of opportunity is the differentiating factor between those who engage in criminal behavior and those who do not.

Functionalist theories rightly emphasize connections between conformity and deviance in different social contexts. We should be cautious, however, about accepting the idea that people in poorer communities aspire to the same things as more affluent people. Most adjust their aspirations to the reality of their situation. Merton, Cohen, and Cloward

and Ohlin can all be criticized for presuming that middle-class values are accepted throughout society. It would also be wrong to suppose that only the less privileged experience a mismatch of aspirations and opportunities. Pressures toward criminal activity exist among other groups, too, as indicated by the white-collar crimes of embezzlement, fraud, and tax evasion, which we will study later.

Members of an El Salvadoran gang display their tattoos. The gangs, called *maras*, began in Los Angeles in the 1980s to protect themselves from established street gangs after their working-class families fled civil war in Central America. How might Cohen, Cloward, and Ohlin explain the emergence of the *maras*?

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# Interactionist Theories

Sociologists studying crime and deviance in the interactionist tradition focus on deviance as a socially constructed phenomenon. Rejecting the idea that some types of conduct are inherently "deviant," they ask how behaviors get defined as deviant and why only certain groups get labeled as deviant.

## Learned Deviance: Differential Association

In 1949, Edwin H. Sutherland advanced a notion that influenced much of the later interactionist work: He linked crime to what he called

differential association. Differential association theory argues that we learn deviant behavior in precisely the same way we learn about conventional behavior: from our contacts with primary groups such as peers, family members, and coworkers. The term *differential* refers to the ratio of deviant to conventional social contacts. We become deviant when exposed to a higher level of deviant persons and influences, compared with conventional influences. In a society that contains a variety of subcultures, some individuals have greater exposure to social environments that encourage illegal activities.

## Labeling Theory

One of the most important interactionist approaches to understanding criminality is labeling theory. It was originally associated with Howard S. Becker's (1963) studies of marijuana smokers. In the early 1960s, marijuana use was a marginal activity of subcultures rather than the lifestyle choice—an activity accepted by many in the mainstream of society—it is today (Hathaway, 1997). Becker found that becoming a marijuana smoker depended on one's acceptance by, and close association with, experienced users, as well as on one's attitudes toward nonusers. Because labeling theorists such as Becker interpret deviance as a process of interaction between deviants and nondeviants, it is not the act of marijuana smoking that makes one a deviant but the way others react to it. Thus, to understand the nature of deviance itself, labeling theorists seek to discover why some people become labeled "deviant."

> According to interactionists, it's not the act of smoking marijuana that makes one a deviant but the way others react to marijuana smoking.

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People who represent law and order or who impose definitions of morality on others do most of the labeling. Thus, the rules by which deviance is defined express the power structure of society; such rules are framed by the wealthy for the poor, by men for women, by older people for younger people, and by ethnic majorities for minority groups. For example, many children wander into other people's gardens, steal fruit, or skip school. In an affluent neighborhood, parents, teachers, and police might regard such activities as relatively innocent. However, when they are committed by children in poor areas, they might be considered acts of juvenile delinquency.

Once children are labeled delinquents, they are stigmatized as a deviant and are likely to be considered untrustworthy by teachers and prospective employers. The children may then relapse into further criminal behavior, widening the gulf between themselves and orthodox social conventions. Edwin Lemert (1972) called the initial act of transgression primary deviation. Secondary deviation occurs when individuals accept the label and see themselves as deviant. Research has shown that how we think of ourselves and how we believe others perceive us influence our propensity for committing crime. One study of a random national sample of young men showed that such negative self-appraisals are strongly tied to levels of criminality; in other words, the perception that one is deviant may in fact motivate deviant behavior (Matsueda, 1992).

Consider Luke, who smashes a shop window while out on the town with friends. The act may be called the accidental result of overly boisterous behavior. Luke might escape with a reprimand and a small fine—a likely result if he is from a respectable background and is seen as being of good character. The window smashing stays at the level of primary deviance. If, however, the police and courts hand out a suspended sentence and make Luke report to a social worker, the incident could become the first step on the road to secondary deviance. Forced to report to a law enforcement official, Luke may begin to see himself as a delinquent and act in ways that fit with this self-perception. The process of "learning to be deviant" tends to be reinforced by the very organizations set up to correct deviant behavior: prisons and social agencies.

Labeling theory assumes that no act is intrinsically criminal but may become so through the formulation of laws and their interpretation by police, courts, and correctional institutions. Although some critics of labeling theory argue that certain acts—such as murder, rape, and robbery—are prohibited across all cultures, this view is surely incorrect. Even within our own culture, killing is not always regarded as murder. In times of war, killing the enemy is approved, and, until recently, the laws in most U.S. states did not recognize sexual intercourse forced on a woman by her husband as rape.

We can more convincingly criticize labeling theory on other grounds. First, labeling theorists neglect the underlying processes that lead to the acts that are subsequently defined as deviant. Indeed, labeling certain activities as deviant is not arbitrary; differences in socialization, attitudes, and opportunities influence how far people engage in behavior likely to be labeled deviant. For instance, children from deprived backgrounds are on average more likely to steal than are richer children. It is not the labeling that leads them to steal so much as their background.

Second, it is not clear whether labeling actually has the effect of increasing deviant conduct. Delinquent behavior tends to increase after a conviction, but is this the result of the labeling itself? Other factors, such as increased interaction with other delinquents or learning about new criminal opportunities, may be involved.

# Conflict Theory

Conflict theory draws on elements of Marxist thought to argue that deviance is deliberate and often political. Conflict theorists deny that deviance is "determined" by factors such as biology, personality, anomie, social disorganization, and labels. Rather, they argue, individuals choose to engage in deviant behavior in response to the inequalities of the capitalist system. Thus, members of countercultural groups regarded as deviant—such as supporters of the Black Power movement or gay liberation movement—are engaging in political acts that challenge the social order. More recently, the Occupy Wall Street and Black Lives Matter protesters were similarly engaging in political acts that challenge the social order.

According to conflict theorists, laws are not applied evenly across the population, with law enforcement targeting less powerful members of society such as drug users. Here, a member of a narcotics task force plans a drug bust.

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Conflict theorists analyze crime and deviance in terms of the social structure and the preservation of power among the ruling class. For example, they argue that laws serve the powerful to maintain their privileged positions. These theorists reject the idea that laws are applied evenly across the population. Instead, as inequalities increase between the ruling class and the working class, law becomes the key instrument for the powerful to maintain order. This dynamic is evident in the criminal justice system, which has become increasingly oppressive toward working-class offenders or in tax legislation that disproportionately favors the wealthy. This power imbalance is not restricted to the creation of laws, however. The powerful also break laws, scholars argue, but are rarely caught. On the whole, these crimes are much more significant than the everyday crime and delinquency that attract the most attention. But, fearful of the implications of pursuing white-collar criminals, law enforcement instead targets less powerful members of society such as prostitutes, drug users, and petty thieves (Chambliss, 1988; Pearce, 1976).

Studies by Chambliss, Pearce, and others have played an important role in widening the debate about crime and deviance to include questions of social justice, power, and politics. They emphasize that crime occurs in the context of inequalities and competing interests among social groups.

# Control Theory

Control theory posits that crime results from an imbalance between impulses toward criminal activity and the social or physical controls that deter it. Control theory assumes that people act rationally and that, given the opportunity, everyone would engage in deviant acts. One of the best-known control theorists, Travis Hirschi, argued that humans are fundamentally selfish beings who make calculated decisions about whether to engage in criminal activity by weighing the benefits and risks. In *Causes of Delinquency* (1969), Hirschi identified four types of bonds that link people to society and law-abiding behavior, thus maintaining social control and conformity: attachment, commitment, involvement, and belief.

Attachment refers to emotional and social ties to persons who accept conventional norms, such as a peer group of students who value good grades and hard work. Commitment refers to the rewards obtained by participating in conventional activities and pursuits. For example, a high school dropout has little to lose by being arrested, whereas a dedicated student may lose the chance to go to college. Involvement refers to one's participation in conventional activities, such as paid employment, school, or community activities. The time spent in conventional activities means time not spent in deviant activities. Finally, beliefs involve holding morals and values that are consistent with conventional tenets of society. For example, people who believe that honesty and hard work are the keys to success may be less likely to resort to theft to get ahead in the world.

When sufficiently strong, these four elements help maintain social control and conformity by rendering people unfree to break rules. If these bonds are weak, delinquency and deviance may result. Hirschi's approach suggests that delinquents have low levels of self-control that result from inadequate socialization at home or at school (Gottfredson & Hirschi, 1990).

Some control theorists see the growth of crime as an outcome of the increasing number of opportunities and targets for crime in modern society. As the population grows more affluent and consumerism becomes more central, more people own goods such as televisions, video equipment, computers, cars, and designer clothing—favorite targets for thieves. Residential homes are increasingly empty during the daytime as more women work outside the home. Motivated offenders can select from a broad range of suitable targets.

Many official approaches to crime prevention in recent years have focused on limiting the opportunities for crime via target hardening—making it more difficult for criminals to commit crimes by minimizing their opportunities to do so and intervening in potential crime situations. Control theorists argue that rather than changing the criminal, the best policy is to take practical measures to control the criminal's ability to commit crime by promoting the use of crime-deterring technologies and practices like community policing, private security services, house alarms, and even gated communities.

How are gated communities an example of target hardening? What are the social consequences of sequestering certain communities behind guards and gates?

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Target-hardening techniques and zero-tolerance policing have been successful at curtailing crime in some contexts; however, these measures do not address the underlying causes of crime and instead are aimed at

protecting and defending certain elements of society from its reach. The growing popularity of private security services, alarm systems, and gated communities suggests that segments of the population feel compelled to defend themselves against others. This tendency is occurring not only in the United States but also in countries such as South Africa, Brazil, and those of the former Soviet Union, where a fortress mentality has emerged among the privileged.

These policies have another unintended consequence: As popular crime targets are "hardened," patterns of crime may simply shift from one domain to another. Target-hardening and zero-tolerance approaches may simply displace criminal offenses from better-protected areas to more vulnerable ones. Neighborhoods that are poor or lacking in social cohesion may well experience a growth in crime and delinquency as target hardening in affluent regions increases.

**Table 7.1 APPLYING SOCIOLOGY TO CRIME**

| THEORY | APPROACH TO UNDERSTANDING DEVIANCE | CONTEMPORARY APPLICATION |
|---|---|---|
| **Functionalist theory** | Deviance serves the function of creating solidarity in the larger society. | In 2019, when a group of affluent parents that included actress Lori Loughlin was caught attempting to gain admission for their children to prestigious universities through a scheme of bribery and deception, parents and children across the country shared outrage over this act of deviance. |

| THEORY | APPROACH TO UNDERSTANDING DEVIANCE | CONTEMPORARY APPLICATION |
|---|---|---|
| **Interactionist theory** | No act is objectively deviant—to understand the nature of deviance, we must understand the process through which some people get labeled deviant. | Diagnostic labels for certain psychiatric disorders—e.g., ADHD and depression—may add to the stigma associated with certain behaviors. |
| **Conflict theory** | The poor disproportionately violate norms and laws in response to their unequal position in society. | Immigrants without papers feel compelled to work "off the books." |
| **Control theory** | Crime results from lack of social and physical controls that deter it. | Street sensors, cameras, and other surveillance systems have contributed to lower crime rates in many cities. |
| **Broken windows theory** | Minor acts of deviance must be controlled in order to avoid a spiral of crime and social decay. | Proactive policing focused on graffiti or drinking in public is believed by some to have the effect of lowering violent crime. |

## The Theory of Broken Windows

Target hardening and zero-tolerance policing are based on a theory known as *broken windows* (Wilson & Kelling, 1982), which arose from a study by the social psychologist Philip Zimbardo (1969). Zimbardo abandoned cars without license plates and with their hoods up in two social settings: the wealthy community of Palo Alto, California, and a poor neighborhood in the Bronx, New York. In both places, the cars were vandalized once passersby, regardless of class or race, sensed that the vehicles had been abandoned. Extrapolating from this study, Wilson and Kelling argued that any sign of social disorder in a community, even the appearance of a broken window, encourages more serious crime. One unrepaired broken window is a sign that no one cares, so breaking more windows—that is, committing more serious crimes—is a rational response by criminals to this situation of social disorder. Thus, minor acts of deviance lead to a spiral of crime and social decay.

In the late 1980s and 1990s, the broken windows theory underpinned policing strategies that aggressively focused on minor crimes such as traffic violations and drinking or using drugs in public. Studies have shown that proactive policing directed at maintaining public order can reduce the occurrence of more serious crimes, such as robbery (Sampson & Cohen, 1988). However, it remains unclear whether the broken windows theory is generalizable to all sorts of crime. Walking in a neighborhood where garbage and rubble are strewn across the sidewalk, we might be more likely to litter, but we might not necessarily be tempted to commit more serious crimes like murder. Lacking a systematic definition of disorder, the police can see almost anything as a sign of disorder and anyone as a threat. In fact, as crime rates fell throughout the 1990s, the number of complaints of police abuse and harassment went up, particularly by young, urban Black men who fit the "profile" of a potential criminal.

# Theoretical Conclusions

The contributions of the sociological theories of crime and deviance are twofold. First, these theories correctly emphasize that criminal and "respectable" behavior are not two discrete categories; rather, they are points along a continuum. The contexts in which particular types of activity are seen as criminal and punishable by law vary widely. Second, all agree that context is important; whether someone engages in a

criminal act or comes to be regarded as a criminal is influenced by social learning and social surroundings.

In spite of its deficiencies, labeling theory is perhaps the most widely used approach to understanding crime and deviant behavior. It explains how some activities become defined in law as punishable, the power relations that form such definitions, and the circumstances in which particular individuals fall afoul of the law.

The way in which crime is understood directly affects the policies developed to combat it. For example, if crime is seen as the product of deprivation or social disorganization, policies might be aimed at reducing poverty and strengthening social services. If criminality is seen as freely chosen, attempts to counter it will take a different form.

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**CONCEPT CHECKS**

1. **How do Merton's and Durkheim's definitions of anomie differ?**
2. **What is the core idea behind differential association theory?**
3. **What are two criticisms of labeling theory?**
4. **What are the root causes of crime, according to conflict theorists?**
5. **How does the theory of broken windows exemplify the core ideas of control theory?**

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# Glossary

anomie
: A concept first brought into wide usage in sociology by Émile Durkheim to refer to a situation in which social norms lose their hold over individual behavior.

relative deprivation
: Deprivation one feels by comparing oneself with a group.

differential association
: An interpretation of the development of criminal behavior proposed by Edwin H. Sutherland, according to whom criminal behavior is learned through association with others who regularly engage in crime.

labeling theory
: An approach to the study of deviance that suggests that people become “deviant” because certain labels are attached to their behavior by political authorities and others.

primary deviation
: According to Edwin Lemert, the actions that cause others to label one as a deviant.

secondary deviation
: According to Edwin Lemert, following the act of primary deviation, secondary deviation occurs when an individual accepts the label of deviant and acts accordingly.

conflict theory
: The argument that deviance is deliberately chosen and often political in nature.

control theory
: The theory that crime is the outcome of an imbalance between impulses toward criminal activity and controls that deter it. Control theorists hold that criminals are rational beings who will act to maximize their own reward unless they are rendered unable to do so through either social or physical controls.

# 3 RESEARCH ON CRIME AND DEVIANCE TODAY

**Recognize the usefulness and limitations of crime statistics. Understand that some individuals or groups are more likely than others to commit, or be the victims of, crime. Familiarize yourself with some of the varieties of crime.**

Research on criminal behavior helps us better understand how deviance arises and why we think of some things as deviant but not others.

## Race and the Criminal Justice System

Much contemporary research on crime and deviance has focused on the relationship between race and the American criminal justice system. Today, many sociologists are interested in the ways we try to control, police, and punish deviant behavior—and how our legal system disproportionately punishes individuals of color—in particular, African American men.

Think back to our earlier discussion of the Italian American Mafia. In a later study titled *Black Mafia* (1974), Francis Ianni found that as Italian Mafia members moved out of crime and into the American mainstream, organized crime persisted—with new ethnic groups arriving to take control of former Mafia enterprises. Ianni considers whether this process of "ethnic succession" will occur in the case of Black and Puerto Rican Americans.

Like members of the earlier Italian American Mafia, many Black and Puerto Rican Americans in the newer Mafia sought to lead respectable lives and escape urban poverty through illegal means. Ianni's analysis asks whether, over time, the Black Mafia "can also follow the pattern of Italians and use these same monies as a basis for movement into legitimate areas" (Gladwell, 2014). Ultimately, Ianni found that Black Mafia members faced unique constraints in expanding their criminal organizations beyond their own neighborhoods and amassing sufficient wealth to reinvest in the legitimate economy. First, the Black Mafia became overly dependent on

the drug trade and was unable to diversify its criminal activities in the same way as the Italian Mafia had done. The drug trade upon which they depended would later receive extraordinary scrutiny and punitive action from the federal government and law enforcement officials. Second, they were never able to develop the kinds of relations with White politicians that once contributed to the stability of White organized crime.

Today, rates of mass incarceration linked to the drug trade have reached historic peaks. Police increasingly rely on new surveillance techniques to control crime and the drug trade in urban ghettos, which causes young Black men to lead lives as fugitives "on the run" (Goffman, 2014). While organized crime may have provided a pathway "up and out" for Italian Americans, it seems to have had the opposite effect for Black Americans (Ianni, 1974). Both historically and today, we see how race interacts with our criminal justice system to allow some deviants to enter mainstream society while cutting off those same pathways for others.

# Mass Incarceration

Today, the United States locks up more people (nearly all men) per capita than any other country and has by far the most punitive justice system in the world. Although the United States makes up less than 5 percent of the world's overall population, it accounts for more than 20 percent of the world's prisoners (Wagner & Bertram, 2020). The so-called prison boom began in the 1970s, with the number of inmates nearly quintupling—from roughly 100 inmates per 100,000 residents for most of the twentieth century to 486 inmates per 100,000 residents by 2004 (Pager, 2007). More than 2 million people are currently incarcerated in American prisons and jails, with another 5 million falling under the jurisdiction of the penal system (Nellis, 2023; Sawyer & Wagner, 2023).

The American prison system employs more than 700,000 people and costs more than $81 billion annually to maintain (Kyckelhahn, 2015; Slevin, 2005; Wagner & Rabuy, 2017). The price of imprisoning an individual is enormous; it costs an average of $39,158 to keep a prisoner in the federal prison system for one year (Federal Bureau of Prisons, 2021). The system has also become partially privatized, with private, for-profit companies building and administering prisons to accommodate the growing inmate population. Critics claim that a "prison-industrial complex" has emerged. Large numbers of people—including bureaucrats, politicians, and prison

employees—have vested interests in the existence and further expansion of the prison system.

A prison in Chino, California, is forced to house inmates in the gymnasium due to overcrowding.

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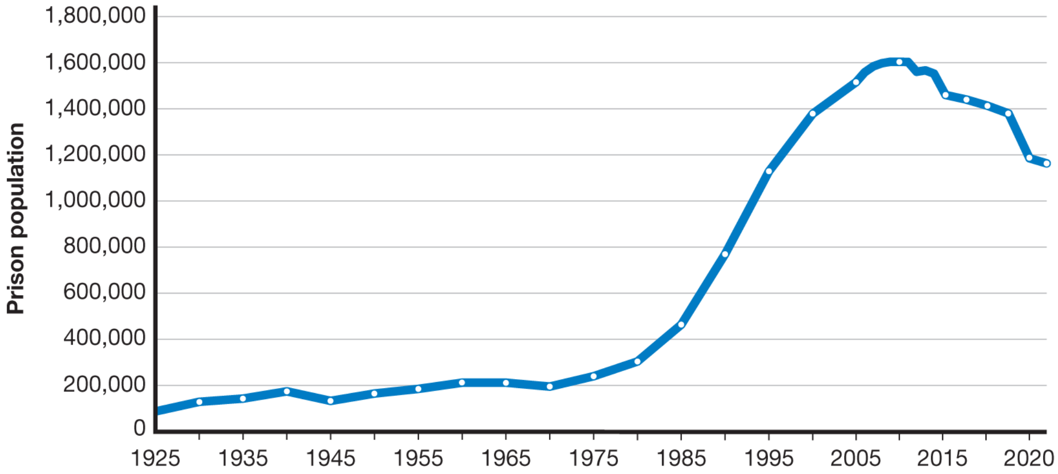
Mass incarceration has had a particularly deleterious effect on Black communities; indeed, African Americans make up around 38 percent of the current prison population, though they represent only 12 percent of the U.S. population (Federal Bureau of Prisons, 2023b). In *The New Jim Crow*, legal scholar Michelle Alexander (2012) argues that mass incarceration creates a kind of caste system in the United States. According to Alexander, understanding mass incarceration means understanding not only the criminal justice system but also the entire structure of policies and practices that stigmatize and marginalize those who are considered criminals.

These policies and practices affect individuals even after they have been released from prison. In *Marked*, Devah Pager (2007) focuses on the difficulties former inmates face when attempting to find jobs upon release. Given that the ex-inmate population is approximately six times that of the inmate population, Pager argues that it is of critical importance to understand the types of policies governing prisoner reentry into society. By conducting an experiment that involved having both Black and White

applicants apply to entry-level positions in Milwaukee, Pager found that Whites were much preferred over Blacks, and nonoffenders were much preferred over ex-offenders. Employers were half as likely to consider Whites with a felony conviction as equally qualified nonoffenders. For Blacks, the effects were even greater. Black ex-offenders were only one-third as likely to receive a callback as nonoffenders. But most surprising was the comparison of these two effects: Blacks with no criminal history fared no better than did Whites with a felony conviction! Essentially, these results suggest that being a Black male in America today is about the same as being a convicted criminal, at least in the eyes of Milwaukee employers. For those who believe that race no longer represents a major barrier to opportunity, these results represent a powerful challenge.

Figure 7.3

**STATE AND FEDERAL PRISON POPULATION, 1925–2021**




Source: Carson, 2022.

# The Death Penalty

Like its mass incarceration rates, the United States' use of capital punishment (the death penalty) makes the country an unusual case compared to other liberal democratic nations. Support for capital punishment is high in the United States, though it has been steadily declining since peaking in the mid-1990s. The 2022 Crime Survey by Gallup reported that support for capital punishment held at 55 percent. Forty-two percent of respondents told Gallup they oppose the death

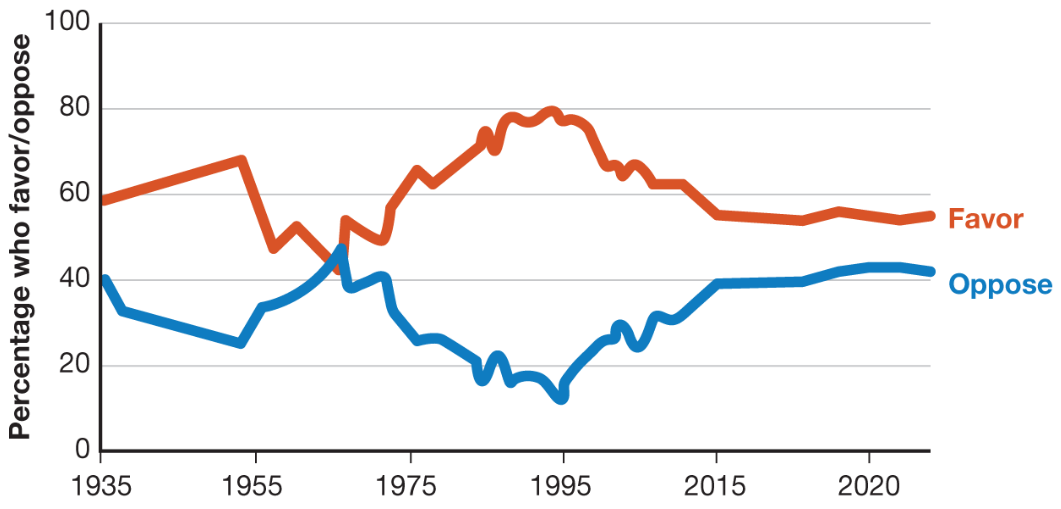
penalty (Death Penalty Information Center, 2022). This represents a significant shift from 1994, when 80 percent of those surveyed supported the death penalty and only 16 percent were opposed to it. Nevertheless, American support of capital punishment is unusual in an international political climate that has increasingly condemned the use of the death penalty.

In *Peculiar Institution: America's Death Penalty in an Age of Abolition*, David Garland (2010) discusses the political institutions and historical processes that explain the continuing use of the death penalty in the United States. While use of capital punishment declined from the 1940s to mid-1970s (by which time the United States had almost a decade without any executions), use of capital punishment has since increased. There were 11 executions in 2021 and 18 in 2022, down from 25 in 2018 (Death Penalty Information Center, 2022). From the 1770s to 1970s, the United States followed the example of many other Western nations, permitting capital punishment but steadily reducing its usage. Yet today it remains one of the last Western countries to legally permit the practice, and it relies upon capital punishment frequently to penalize violent criminals—a practice many other countries find hard to understand. What accounts for the persistence of the death penalty in the United States?

Some scholars have argued that something exceptional about American culture has allowed the death penalty to remain in place, despite abolition in other countries. However, Garland argues against this view. Rather, American "deviance" from an international trend toward abolishing the death penalty is better understood by looking at the specific historical circumstances, institutions, and social processes that produced this current state of affairs. In particular, Garland argues that three features of the American political system at the federal and state level—"the state's relative autonomy from the national state, the local control of the power to punish, [and] the political dominance of small groups"—explain the historical development of capital punishment in America. Though the Supreme Court had a number of opportunities to overturn the death penalty, concern for the separation of powers and "deference to shifting public sentiment" (Garland, 2010) has discouraged the Court from ruling on behalf of the people.

Figure 7.4

**SUPPORT FOR THE DEATH PENALTY IN THE UNITED STATES**




Source: Death Penalty Information Center, 2022.

While Garland's nuanced argument relates also to the emergence of liberalism and currents of humanitarian and democratic thought in Western nations, he suggests that the masses are generally in support of the death penalty, while elites will move to overturn it. In Western nations that have abolished the death penalty, governing elites like judges and legislators made the decision to abolish the death penalty—with or without the support of their citizens. By contrast, the U.S. Supreme Court has repeatedly left the question of capital punishment to the state courts. This unique feature of the American political system, rather than some essential feature of American culture, best accounts for the continued legality of the death penalty in the United States.

As a result of the way the U.S. legal system treats the most deviant of its criminals, the United States is regarded as a deviant nation on the international stage. However, Garland shows that this apparent deviance is actually a function of specific historical and political processes. By taking a historical and sociological approach to law, we see how the study of deviance can be applied even beyond individuals.

# Security and Terrorism

In the aftermath of September 11, 2001, the United States began building an encompassing security apparatus to protect the country against the specter of global terrorism. Today, many activities we would have once considered mundane—flying home for the holidays, using public

transportation, or calling our loved ones—have become sites of increased security and surveillance. In airports, subways, and federal government buildings nationwide, technologies such as metal detectors and X-ray machines have become commonplace. Do these new security measures protect us against potential threats?

In *Against Security*, Harvey Molotch (2012) asks if the securitization of numerous public spaces across the United States has indeed created a safer society—or if it has instead made us more fearful and less safe. Molotch studies new security techniques used in restrooms, airports, and even the former site of New York City's Twin Towers to show how the United States has worked to create the appearance of order through the visible deployment of security personnel and surveillance technology. These extreme security measures treat all of us as potential deviants but have questionable value for weeding out those who may truly endanger public safety. Indeed, Molotch argues that measures like racial or physical profiling, designed to help security officers identify potentially dangerous individuals, can actually make it easier for those individuals to thwart security measures. For example, terrorists who know that wearing specific clothing, or being of a particular race or ethnicity, will make them more likely to be selected for additional security screening can simply send members of their organization who do not have these characteristics to avoid scrutiny. Thus, profiling on the basis of specific characteristics can actually help people become deviants by showing them which rules they need to circumvent.

In response to these concerns, Molotch advocates for a more reasoned, empathetic approach to thinking about security. Molotch explains that "real security comes from the assemblage of artifacts, habits, and procedures, which mostly are already there" (p. 217). Rather than designing security systems on the assumption that all individuals are potential deviants, he appeals to the human instinct toward "decency"—our natural instinct to help one another in times of need. Molotch argues that when people encounter someone who is drowning, they naturally throw a rope and do not need to be coerced to do so (p. 193). As a result, measures that accord with the formal and informal norms of decency upon which a society already relies will be most effective in preventing deviant behavior.

Have new security techniques created a safer society or do they just treat everyone like potential deviants, making us more fearful and less safe?

Molotch’s work suggests that our efforts to weed out deviants not only may be ineffective but also may make it more difficult to live together in a society. Our efforts to superimpose a foreign set of norms and regulations to create the appearance of security may dismantle the very mechanisms we already use to maintain social order. For example, consider a city neighborhood in which residents live in cramped, tenement-style housing amid shops and a bustling street life. Individuals of different income levels live together and intermingle with residents on the streets, including street vendors, panhandlers, and the homeless. Crowds gather on the sidewalks, a cacophony of languages emanates from the apartments, and vendors call out to potential customers passing by.

To outsiders, this street scene might appear disorganized. They might wonder why police haven’t cleared the sidewalk of panhandlers and the homeless or forced vendors to hawk their goods elsewhere. As with the creation of security systems, one could imagine creating highly controlled public spaces and making them available only to certain kinds of residents in an attempt to eliminate this apparent disorder. However, to neighborhood residents who are familiar with one another, the busy street may be one of the safest places in the city. Here, children playing outdoors

can rely on the supervision of a whole cast of neighborhood regulars, like shop owners, who help maintain order. Jane Jacobs (1961) explored this idea in depth in *The Death and Life of Great American Cities*, where she wrote that "the public peace . . . of cities is not kept primarily by the police. . . . It is kept primarily by an intricate, almost unconscious, network of voluntary controls and standards among the people themselves, and enforced by the people themselves." Like Jacobs, Molotch believes that social order is best maintained by practices that individuals themselves negotiate rather than practices imposed by a higher authority.

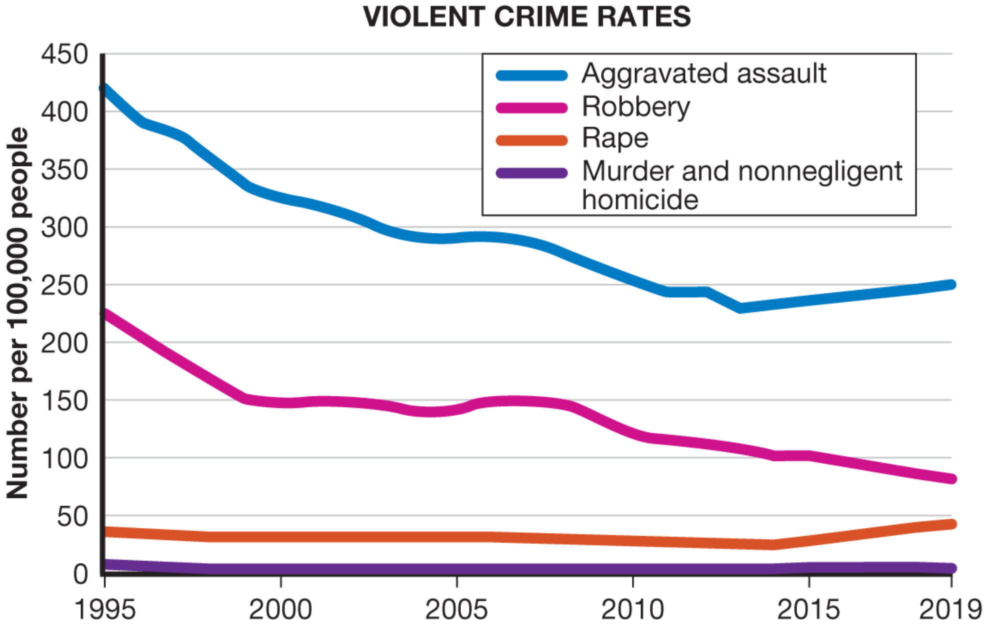
# Reporting on Crime and Crime Statistics

Does American society really have more crime than other societies? Most TV and newspaper reporting is based on official crime statistics the police collect and the government publishes. Most of these reports are based on two sources: Uniform Crime Reports and victimization studies. Each has its own limitations and offers only a partial portrait of crime in American life.

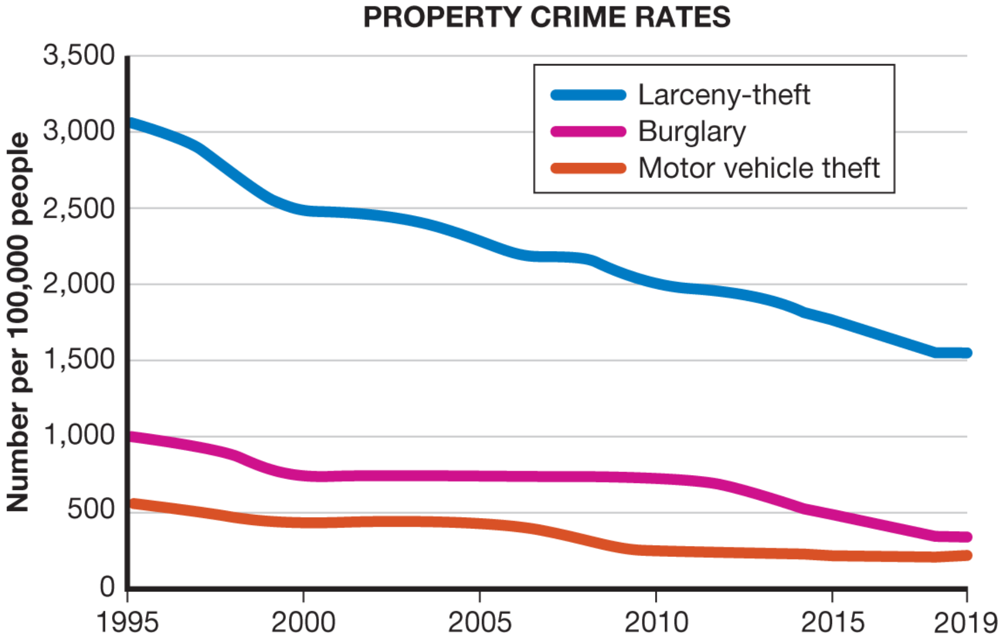
Uniform Crime Reports (UCR) contain official data on crime that is reported to law enforcement agencies across the country that then provide the data to the FBI. The UCR program focuses on "index crimes," which include serious crimes such as murder and nonnegligent manslaughter, robbery, forcible rape, aggravated assault, burglary, larceny/theft, motor vehicle theft, and arson (**Figure 7.5**). Critics of UCR note that the reports do not accurately reflect crime rates because they include only those crimes reported to law enforcement agencies; they don't, for example, include crimes reported to other agencies, such as the IRS. Some argue that by excluding crimes traditionally committed by middle-class persons, such as fraud and embezzlement, UCR data reify the belief that crime is an activity of ethnic minorities and the poor.

Figure 7.5

**CRIME RATES IN THE UNITED STATES, 1995–2019**




Note: The murder and nonnegligent homicides that occurred as a result of the events of September 11, 2001, are not included.




Source: FBI, 2019b.

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Because the UCR program focuses narrowly on crimes reported to the police, criminologists also rely on self-reports, or reports provided by the crime victims themselves. This second source of data is essential because some criminologists think that about half of all serious crimes, such as

robbery with violence, go unreported. The proportion of less serious crimes that go unreported, especially small thefts, is even higher. Since 1973, the U.S. Bureau of the Census has been interviewing households across the country in its National Crime Victimization Survey (NCVS), which confirms that the overall rate of crime is higher than the index of reported crime. For instance, in 2021, less than 50 percent of violent crime was reported (46 percent), including just 22 percent of rape or sexual assaults, 60 percent of robberies, and 42 percent of simple assaults. Auto theft—a form of property crime—is the crime most frequently reported to the police (77 percent) (Thompson & Tapp, 2022).

Public concern in the United States focuses on crimes of violence—murder, assault, and rape—even though there are only about 398.5 violent crimes per 100,000 people (FBI, 2021b). According to the FBI's 2021 Crime in the United States Report, 1.3 million violent crimes occurred in the United States in 2021 (FBI, 2022). In the United States, the most common victims of murder and other violent crimes (with the exception of rape) are young, poor African American men in larger cities. The rate of murder among Black male teenagers is more than five times the rate for their White counterparts, although this disparity has declined in recent years. In general, whether indexed by police statistics or the National Crime Victimization Survey, violent crimes, such as burglary and car theft, are more common in cities than in suburbs and more common in suburbs than in smaller towns. The most likely explanation for the overall high level of violent crime in the United States is a combination of the availability of firearms, the general influence of the frontier tradition, and the subcultures of violence in the large cities.

A notable feature of most crimes of violence is their mundane character. Most assaults and homicides bear little resemblance to the murderous, random acts of gunmen or the carefully planned homicides highlighted in the media. Murders generally happen in the context of family and other interpersonal relationships; the victim usually knows the murderer.

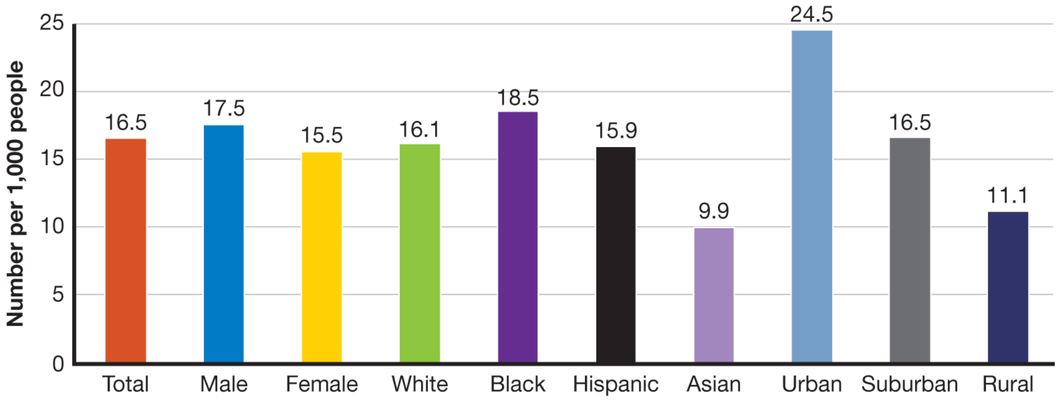
# Victims and Perpetrators of Crime

Are some individuals or groups more likely to commit crimes or to become the victims of crime? Criminologists say yes—research and crime statistics show that crime and victimization are not randomly distributed among the population (**Figure 7.6**). Men are more likely than women, for example, to

commit crimes; the young are more often involved in crime than are older people.

Figure 7.6

**RATE OF VIOLENT VICTIMIZATION, 2021**




Source: Thompson & Tapp, 2022.

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The likelihood of someone becoming a victim of crime is linked to the area where they live. Inner-city residents run a much greater risk of becoming victims than do residents of affluent suburban areas. The fact that ethnic minorities are concentrated in inner-city regions appears to be a significant factor in their higher rates of victimization.

## Gender and Crime

Like other areas of sociology, criminological studies have traditionally ignored half the population: Women are largely invisible in both theoretical considerations and empirical studies. Since the 1970s, important feminist works have noted the way in which criminal transgressions by women occur in different contexts than those by men and how assumptions about appropriate male and female roles influence women's experiences with the criminal justice system. Feminists have also highlighted the prevalence of violence against women, both at home and in public.

**Male and Female Crime Rates** The statistics on gender and crime are startling. For example, of all crimes reported in 2020, nearly three-quarters of arrestees (73 percent) were men (Office of Juvenile Justice and Delinquency Prevention, 2022). There is also an enormous imbalance in

the ratio of men to women in prison, not only in the United States but in all the industrialized countries. In 2023, women made up 6.8 percent of the state and federal prison populations in the United States (Federal Bureau of Prisons, 2023a). There are also contrasts between the types of crimes men and women commit. Women's offenses rarely involve violence and are almost all small scale. Petty thefts such as shoplifting and public order offenses such as prostitution and public drunkenness are typical female crimes.

At 81 per 100,000 in 2017, the imprisonment rate for adult women is significantly lower than the imprisonment rate for adult men: 1,082 per 100,000.

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Perhaps the real gender difference in crime rates is smaller than the official statistics show. In the 1950s, Otto Pollak suggested that certain crimes perpetrated by women go unreported because women's domestic role enabled them to commit crimes at home and in the private sphere. Pollak (1950) also argued that female offenders are treated more leniently because male police officers adopt a "chivalrous" attitude toward them. The suggestion that the criminal justice system treats women more leniently has prompted much debate. The "chivalry thesis" has been applied in two ways. First, police and other officials may indeed regard female offenders as less dangerous than men and excuse activities for which they would

arrest males. Second, in sentencing for criminal offenses, women get sent to prison much less often than men.

A number of empirical studies have tested the chivalry thesis, but the results remain inconclusive. One difficulty is assessing the relative influence of gender compared with other factors such as age, class, and race. For example, older women offenders tend to be treated less aggressively than their male counterparts. Other studies have shown that Black women receive worse treatment than White women at the hands of the police.

Another perspective, which feminists have adopted, examines how social understandings about femininity affect women's experiences in the criminal justice system. One argument is that women receive harsher treatment when they have allegedly deviated from the norms of female sexuality. For example, young girls who are perceived to be sexually promiscuous are more often taken into custody than boys who are promiscuous. Such young women are seen as doubly deviant—not only breaking the law but also flouting the rules for appropriate female behavior. In such cases, they are judged less on the nature of the offense and more on their deviant lifestyle. Thus, the criminal justice system operates under a double standard, considering male aggression and violence as natural but female offenses as reflecting psychological imbalances (Heidensohn, 1985).

To make female crime more visible, feminists have conducted detailed investigations on female criminals—from girl gangs to female terrorists to women in prison. Such studies have shown that violence is not exclusively a characteristic of male criminality. Women are much less likely than men to participate in violent crime but are not always inhibited from doing so. Why, then, are female rates of criminality so much lower than those of men?

Some evidence shows that female lawbreakers often avoid coming before the courts because they persuade the police or other authorities to see their actions in a particular light. They invoke the "gender contract"—the implicit contract between men and women whereby to be a woman is to be erratic and impulsive on the one hand and in need of protection on the other (Worrall, 1990).

Yet differential treatment cannot account for the vast difference between male and female rates of crime. The reasons are probably the same as those

that explain gender differences in other spheres: Male crimes remain "male" because of differences in socialization and because men's activities are still more nondomestic than those of most women. Further, control theory may also offer insights. Because women are usually the primary caregiver to their children and other relatives, they may have attachments and commitments that deter them from committing deviant acts. Imprisonment would have very high and undesirable costs both to women and to their kin.

Ever since the late nineteenth century, criminologists have predicted that gender equality would reduce or eliminate the differences in criminality between men and women, but as yet, crime remains a gendered phenomenon.

**Crimes Against Women.** In certain categories of crime—domestic violence, sexual harassment, sexual assault, and rape—men are overwhelmingly the aggressors and women the victims. Although each of these acts has been practiced by women against men, they remain almost exclusively crimes against women. It is estimated that one-quarter of women are victims of violence at some point, but all women face the threat of such crimes either directly or indirectly.

For many years, the criminal justice system ignored these offenses; victims had to persevere tirelessly to gain legal recourse. Even today, the prosecution of crimes against women is hardly straightforward. Yet feminist criminology has raised awareness of crimes against women and integrated such offenses into mainstream debates on crime. In this section, we examine the crime of rape, leaving discussions of domestic violence and sexual harassment to other chapters (see Chapters 10 and 15).

The Gulabi Gang, also known as the Pink Vigilantes, fights against police corruption, domestic violence, and sexual abuse by physically attacking policemen who refuse to register rape cases and husbands who hit their wives.

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The extent of rape is very difficult to assess accurately. Only a small proportion of rapes come to the attention of the police and are recorded in the statistics. In 2020, only 310 out of every 1,000 cases of rape or sexual assault were reported in the United States (RAINN, 2020). However, from surveys of victims, we know that only about a third of instances of rape and sexual assault are reported to the police. At the same time, data from a nationally representative survey indicate that 1 in 4 women and 1 in 9 men in the United States have been victims of a rape or attempted rape (Basile et al., 2022).

A woman might not report sexual violence for many reasons. The majority of rape victims either wish to put the incident out of their minds or are unwilling to participate in the humiliating process of medical examination, police interrogation, and courtroom cross-examination. The legal process takes a long time and can be intimidating. Courtroom procedure is public, and the victim must face the accused. Proof of penetration, the identity of the rapist, and the fact that the act occurred without the woman's consent all have to be forthcoming. A woman may feel that she is the one on trial,

particularly if her own sexual history is examined publicly, as is often the case.

Recently, women's groups have sought change in both legal and public thinking about rape, stressing that rape should be seen not as a sexual offense but as a violent crime. It is not just a physical attack but an assault on an individual's integrity and dignity. Rape is clearly related to the association of masculinity with power, dominance, and toughness. It is primarily the result not of overwhelming sexual desire but of the ties between sexuality and feelings of power and superiority. The sexual act itself is less significant than the debasement of the woman (Estrich, 1987). This campaign has managed to change legislation, and today rape is generally recognized in law as a type of criminal violence.

In a sense, all women are victims of rape. Women who have never been raped may be afraid to go out alone at night, even on crowded streets, and may be almost equally fearful of being alone in a house or apartment. Susan Brownmiller (1975) has argued that rape is part of a system of male intimidation that keeps all women in fear. Those who are not raped are affected by the anxieties thus provoked and by the need to be more cautious in everyday aspects of life than men have to be.

## Crimes Against LGBTQ+ Individuals

Feminists claim that understandings of violence are highly gendered and are influenced by perceptions about risk and responsibility. Because women are considered less able to defend themselves, common sense holds that they should modify *their* behavior to reduce the risk of victimhood. For example, not only should women avoid walking in unsafe neighborhoods alone and at night, but they also should avoid dressing provocatively or behaving in a manner that could be misinterpreted. Women who fail to do so can be accused of "asking for trouble." In a court setting, their behavior can be a mitigating factor in considering the perpetrator's act of violence (Dobash & Dobash, 1992; Richardson & May, 1999). It has been suggested that a similar logic applies in violent acts against members of the LGBTQ+ community.

Victimization studies reveal that gays and lesbians experience a high incidence of violent crime and harassment. In 2021, there were 1,132 hate crimes based on sexual orientation. Because sexual minorities remain stigmatized and marginalized in many societies, they are more often

treated as deserving of crime rather than as innocent victims (FBI, 2021a). Same-sex relationships are still seen as belonging to the private realm, whereas heterosexuality is the norm in public spaces. Lesbians and gay men who display their sexual identities in public are often blamed for making themselves vulnerable to crime, in a sense even provoking it. This notion ultimately denies both the essential personhood and rights of the victim. Such crimes have led many social groups to call for hate-crime legislation to protect the human rights of groups who remain stigmatized.

## Crimes of the Powerful

Although there are connections between crime and poverty, it would be a mistake to suppose that crime is concentrated among the poor. Crimes by people in positions of power and wealth can have farther-reaching consequences than the often petty crimes of the poor. The term white-collar crime, introduced by Edwin Sutherland (1949), refers to crime affluent people commit. This category of criminal activity includes tax fraud, antitrust violations, illegal sales practices, securities and land fraud, embezzlement, the manufacture or sale of dangerous products, and illegal environmental pollution, as well as straightforward theft.

The most famous contemporary instance of white-collar crime with obvious victims is the recent case of Sam Bankman-Fried, also famously known as SBF. The son of two Stanford professors, he attended MIT and majored in physics with a minor in mathematics. After graduation in 2014, he worked briefly at a trading firm and for the Center for Effective Altruism, a nonprofit committed to evidence-based approaches to benefiting others. In 2017 he founded Alameda Research, a quantitative trading firm, and in 2019 he founded FTX, a cryptocurrency derivatives exchange. Within a few years, he was among the richest people in the world, with a net worth of $26 billion. He lived in the Bahamas while claiming to be earning all of his money to invest in projects that would be the most effective in helping other people. However, when Alameda Research ran short of funds, SBF illegally took $16 billion of customer funds from FTX. It would soon be discovered that since the founding of his company, he had been leveraging his customers' personal cryptocurrency deposits for Alameda's own bets. SBF turned his cryptocurrency exchange into one of the largest financial schemes in history, defrauding his clients of more than $18 billion, including life savings, children's college funds, and the assets of charitable organizations. Today, SBF faces the possibility of life in prison. When

asked about his commitments to effective altruism, he told a reporter that it was “just PR” and “a dumb game we woke westerners play where we say all the right shibboleths and so everyone likes us” (Piper, 2022).

One of the most high-profile white-collar criminals in recent memory is Sam Bankman-Fried. Bankman-Fried founded FTX, a crypto-currency derivatives exchange, and defrauded his clients of more than $18 billion.

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The distribution of white-collar crimes is even harder to measure than that of other types of crime; most do not appear in the official statistics at all. Efforts to detect white-collar crime are limited, and rarely do those who are caught go to jail. Although the authorities regard white-collar crime more tolerantly than crimes of the less privileged, the amount of money involved in white-collar crime in the United States is 40 times greater than the amount involved in crimes against property, such as robberies, burglaries, larceny, forgeries, and car thefts (President’s Commission on Organized Crime, 1986). Some forms of white-collar crime, moreover, affect more people than lower-class criminality does. An embezzler might rob thousands—or today, via computer fraud, millions—of people.

**Corporate Crime**Corporate crime describes the offenses large corporations commit. The increasing power and influence of large corporations and their global reach mean that they touch our lives in many

ways—from producing the cars we drive and the food we eat to affecting the natural environment and the financial markets.

Corporate crime is pervasive and widespread. Both quantitative and qualitative studies of corporate crime have concluded that a large number of corporations do not adhere to legal regulations (Slapper & Tombs, 1999). Studies have revealed six types of violations: *administrative* (paperwork or noncompliance), *environmental* (pollution, permit violations), *financial* (tax violations, illegal payments), *labor* (working conditions, hiring practices), *manufacturing* (product safety, labeling), and *unfair trade practices* (anticompetition, false advertising).

The collapse of Rana Plaza in Bangladesh, which killed at least 1,100 and injured another 2,500, is a tragic example of corporate crime.

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Sometimes there are obvious victims; for instance, environmental disasters such as the 2010 Upper Big Branch coal mine explosion in West Virginia and the health dangers posed to women by silicone breast implants. One of the most devastating examples in recent years was the April 2013 fire and collapse of an eight-story commercial building, Rana Plaza, in Bangladesh. The death toll topped 1,100 with an additional 2,500 injured people rescued from the building. Rana Plaza housed several garment manufacturers. Although building inspectors had found cracks in the building days earlier and recommended that the building be evacuated and

shut down, many of the garment workers were forced to return to work the following day.

As the Rana Plaza tragedy demonstrates, the hazards of corporate crime are all too real. But very often, victims of corporate crime do not see themselves as such. This is because in "traditional" crimes, the proximity between victim and offender is much closer; it is difficult not to realize that you have been mugged! In the case of corporate crime, greater distances in time and space mean that victims may not realize they have been victimized or may not know how to seek redress for the crime.

Pollution, product mislabeling, and violations of health and safety regulations affect many more people than petty criminality affects. However, the effects of corporate crime are often experienced unevenly within society. Those who are disadvantaged by other socioeconomic inequalities suffer disproportionately. For example, safety and health risks in the workplace tend to occur in low-paying occupations. Many of the risks from health care products and pharmaceuticals have affected women more than men, as in the case of contraceptives and fertility treatments with harmful side effects (Slapper & Tombs, 1999).

## Cybercrime

It seems certain that the information and telecommunications revolution will change the face of crime. Internet-based fraud is one of the fastest-growing categories of crime. The *2019 Global State of SMB Cybersecurity* report conducted by the Ponemon Institute found that more than 76 percent of American companies experienced a cyberattack over the previous year, yet only 28 percent of security violations were reported to the police, likely out of fears that negative publicity would damage the company's stock price or that competitors would steal valuable information (Ponemon Institute, 2019). The annual cost of cybercrime worldwide was estimated to be $8.4 trillion in 2022 (Statista, 2022).

The global reach of telecommunications crime poses challenges for law enforcement in terms of detecting and prosecuting crimes. Police from the countries involved must determine the jurisdiction in which the act occurred and agree on extraditing the offenders and providing evidence for prosecution. Although police cooperation across national borders may improve with the growth of cybercrime, at present cybercriminals have a great deal of room to maneuver.

At a time when financial, commercial, and production systems in countries worldwide are being integrated electronically, rising levels of internet fraud and unauthorized electronic intrusions are potent warnings of the vulnerability of computer security systems. From the FBI to the Japanese government's anti-hacker police force, governments are scrambling to contend with new and elusive forms of cross-national computer activity.

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**CONCEPT CHECKS**

1. **How does Devah Pager's study of former inmates support Michelle Alexander's argument that mass incarceration has created a new caste system in the United States?**
2. **According to David Garland, what accounts for the continued use of capital punishment in the United States?**
3. **Contrast the following two explanations for the gender gap in crime: behavioral differences and biases in reporting.**
4. **What are some consequences of white-collar crime?**

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# Glossary

white-collar crime
: Criminal activities carried out by those in white-collar, or professional, jobs.

corporate crime
: Offenses committed by large corporations in society. Examples of corporate crime include pollution, false advertising, and violations of health and safety regulations.

cybercrime
: Criminal activities by means of electronic networks or information technologies. Electronic money laundering, personal identity theft, electronic vandalism, and monitoring electronic correspondence are all emergent forms of cybercrime.

# 4 UNANSWERED QUESTIONS

**Explore the different explanations for the decline in overall crime between the 1990s and present. Think about the best solutions to reduce crime. Consider the ways in which individuals and governments can reduce crime.**

## What Caused America's Great Crime Decline?

Beginning in the 1990s, crime rates began to decline nationwide. In 2011, the Federal Bureau of Investigation announced that crime rates had reached a 40-year low. Incredibly, the number of murders, rapes, aggravated assaults, and robberies had all dropped considerably. Criminologists nationwide offered various explanations for this overall decline in crime. Some suggested that better economic conditions and lower unemployment had led to lower crime rates, though the 2008 recession, which surprisingly did not reverse the trend, presented a challenge to this theory. Others argued that the rise of sophisticated home security systems had made citizens more adept at protecting themselves from crime, or that policing had become more targeted and disciplined through "hot-spot policing" that stationed officers in and around areas where crime rates were still relatively high. Yet other scholars suggested that the drop in crime may have been indebted to the less widespread use of cocaine and other illegal drugs or even to lower levels of lead contamination in Americans' blood (a factor linked to higher levels of aggression in children) (Wilson, 2011).

Nonetheless, by the mid-2010s certain cities, including Chicago and Philadelphia, were seeing an uptick in murders and shootings, a trend that continued and spread nationwide during the Covid-19 pandemic. Although the incidence of other forms of crime remained steady, the rate of murder and gun violence was beginning to rise. In 2020, for example, the number of people shot to death in Chicago rose by 267 over the previous year—the highest numerical increase in the country—while New York City, Philadelphia, and Atlanta saw a 30 percent increase in

fatal shootings. Although statistics indicated an increase in hate crimes directed at Asians, as well as intimate-partner violence, the main victims were still primarily young men of color. While many have attributed this recent phenomenon at least in part to the Covid-19 pandemic and the general stress, malaise, and disconnection from community life that it brought about, other have laid the blame on the Black Lives Matter protests of 2020 and the loud call for defunding the police, which led to police pullback in certain cities. Yet though statistics do suggest that strict policing curbs crime, sociologists such as Patrick Sharkey have argued that it does so through brute force and incarceration, which hinder the development of safe, strong, and stable communities that can resist the destabilization caused by crises such as the recent pandemic (Thompson, 2021).

# Are Prisons the Answer to Higher Crime Rates?

As we have seen earlier in this chapter, one popular hypothesis is that mass incarceration is related to a lower crime rate. Given that the U.S. crime rate decreased over roughly the same period (beginning in the mid-1970s), this correlation might suggest that imprisonment is an effective deterrent for crime. Indeed, Americans today favor tougher prison sentences for all but relatively minor crimes. However, even if the prison system were expanded, it wouldn't significantly reduce the level of serious crime. About 11 percent of violent crimes result in arrest, and only about 2 percent end in conviction (Baughman, 2020). Further, America's prisons are so overcrowded that the average convict released from prison served less than half of their sentence (FBI, 2019b).

About 38 percent of the current prison population are African American (Sawyer & Wagner, 2023). In some major urban areas, counting those currently in prison, more than half of working-age African American men have criminal records (Alexander, 2011). Given that prisons often make offenders more hardened criminals, it is increasingly unclear whether imprisonment leads to a lower crime rate. The harsher and more oppressive prison conditions are, the more likely it is that inmates will be brutalized by the experience. Yet if prisons were attractive and pleasant places to live, would they have a deterrent effect?

Although prisons do keep some dangerous men (and a tiny minority of dangerous women) off the streets, evidence suggests a need for other means to deter crime. Robert Gangi, then director of the Correctional Association of New York, said that "building more prisons to address crime is like building more graveyards to address a fatal disease" (quoted in Smolowe, 1994).

All in all, a sociological interpretation of crime makes clear that there are no quick fixes. The causes of crime, especially crimes of violence, are bound up with structural conditions of American society, including widespread poverty, the condition of the inner cities, and the deteriorating life circumstances of many young men.

Most discussions of mass incarceration assume that prisons must exist in one form or another—that a society without prisons would be an impossibility. But there is also a movement in the United States to eliminate prisons altogether. Originally made popular by the scholar-activist Angela Davis (2005), today prison abolition is embraced by a wide range of scholars in various forms. Davis's argument is that prisons are inhumane and tend to increase crime by causing serious harm to prisoners and their families. Others, such as the philosopher Tommie Shelby, are influenced by the prison abolition movement while not embracing it entirely. He believes that prisons are particularly necessary to deter those who are a danger to others. Shelby (2022) contends, "Incarceration is a drastic crime-control measure, best reserved for the most serious offenses and for those offenders who, after suffering less severe penalties, continue to show disregard for others' basic rights."

# Can We Reduce Crime Through New Policing Techniques?

Some sociologists and criminologists have suggested that visible policing techniques, such as patrolling the streets, are reassuring for the public. Such activities support the perception that the police actively control crime, investigate offenses, and support the criminal justice system. But sociologists also see a need to reassess the role of policing in the late modern age. Policing, they argue, is now less about controlling crime and more about detecting and managing risks. Mostly it involves

communicating knowledge about risk to other institutions in society that demand such information (Ericson & Haggerty, 1997).

According to this view, police are primarily “knowledge workers,” spending time processing information, drafting reports, or communicating data. Consider the “simple” case of an automobile accident in Ontario, Canada. A police officer is called to the scene of an automobile accident involving two vehicles, with minor injuries and one drunk driver. The investigation takes 1 hour; the drunk driver is criminally charged with the impaired operation of a motor vehicle, causing bodily harm, and operating a motor vehicle under the influence of excess alcohol. The driver’s license is automatically suspended for 12 hours.

Following this routine investigation, the officer spends 3 hours writing up 16 reports. Here, the role of police as brokers of information becomes clear:

- The provincial motor registry requires information about the location of the accident and the vehicles and people involved. This registry is used for risk profiling in accident-prevention initiatives, traffic management, and resource allocation.
- The automobile industry needs to know about the vehicles involved to improve safety standards, report to regulatory agencies, and provide safety information to consumer groups.
- The insurance companies involved need information to determine responsibility and make awards in the case. They also require police information to develop statistical profiles of risk to set premiums and compensation levels for clients.
- The public health system requires details on the injuries. This knowledge is used for statistical profiles and to plan emergency-service provision.
- The criminal courts require police information as material for the prosecution and as proof that the police properly investigated the scene and collected evidence.
- The police administration itself requires reports on the incident for both internal records and national computer databases.

This example reveals how police work is increasingly about “mapping” and predicting risk within the population.

Sociologist Victor Rios documented how the pervasive presence of police created a culture of mistrust and resistance to authority for young Black and Hispanic men in Oakland, California.

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The informational demands of other institutions, such as the insurance industry, now require that police gather and report information in a way that is compatible with the needs of outside agencies. Computerized systems and forms define the way in which police report information. Rather than writing narrative accounts, police input the facts of a case into standardized forms by checking off boxes and choosing among available options. The information is used to categorize people and events as part of creating risk profiles. But such close-ended reporting formats influence what police observe and investigate, how they understand and interpret an incident, and the approach they take in resolving a problem. This emphasis on information collection and processing can alienate and frustrate many police officers, who see a distinction between "real" police work (e.g., investigating crimes) and the bureaucratic "donkey work" of reports and paper trails.

In recent years, several high-profile court cases have attracted mainstream media attention around stop-and-frisk policies in major American cities. These policies work to put a visible police presence in communities with high crime rates by temporarily detaining and

questioning individuals at an officer's discretion. In a decision declaring New York's stop-and-frisk policy to be unconstitutional, federal judge Shira A. Scheindlin declared that the frequent stops made by N.Y. police were in violation of the Fourth Amendment, which protects citizens from unreasonable searches and seizures. Judge Scheindlin's decision asks us to consider the effects of such policies in communities where individuals of color—overwhelmingly young men—are targeted by police officials on a near daily basis.

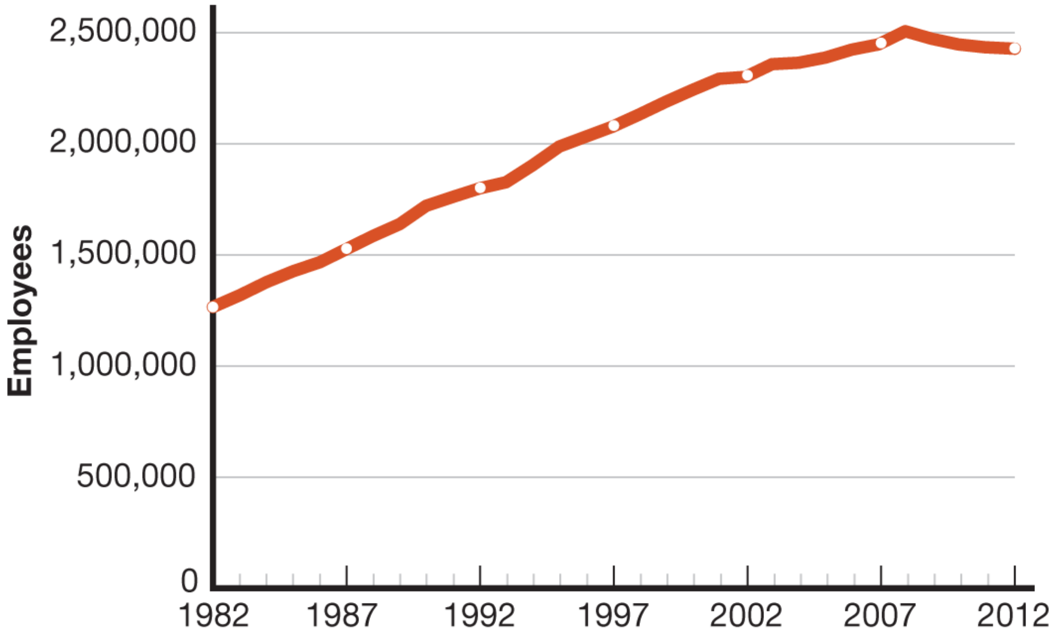
In *Punished: Policing the Lives of Black and Latino Boys* (2011), sociologist Victor Rios describes the lived experience of young Black and Hispanic American men in Oakland, California. While Rios discusses much broader themes related to the policing of young men of color, temporary detainment policies such as stop and frisk contribute significantly to the "mass and ubiquitous criminalization of marginalized young people" (Rios, 2011). Rios documents the strain that policies like stop and frisk place on heavily policed communities, and how young men respond to the pervasive presence of police and other authority figures in their schools and neighborhoods. For the men in Rios's study, negative interactions with police officers are a regular occurrence. These policies affect not only their daily lives but also the way in which they perceive themselves and their long-term life trajectories. Punitive policing created a culture of mistrust and resistance to authority, and even those who seldom broke the rules were perceived negatively by others in their community. In this setting, teachers and potential employers often interpreted innocuous behavior as acts of deviance or criminal activity and denied the young men access to the resources that could have helped them grow in positive ways.

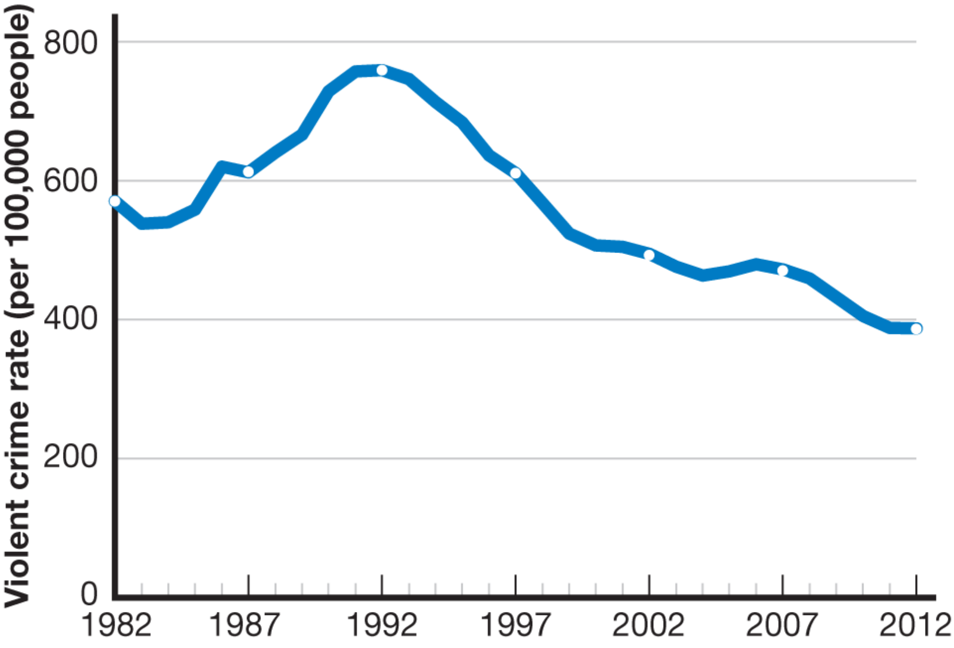
Today, governments eager to appear decisive on crime favor work to increase the number and resources of the police. But it is not clear that a greater police presence translates into lower crime rates. In the United States, official statistics on violent crime rates and number of police cast doubt on such a link (**Figure 7.7**). This finding raises puzzling questions: If increased policing does not prevent violent crime, why does the public demand a visible police presence? What role does policing play in our society, and what role should it play?

Figure 7.7

**JUSTICE EMPLOYMENT AND CRIME RATES, 1982–2012**

*Although the number of police steadily increased between 1982 and 2012, the crime rate dropped, increased, and dropped again during this period. Therefore, no causal link can be made between the number of police and the crime rate.*




Sources: U.S. Bureau of Justice Statistics, 2011, 2014a, 2014b.

## Will New Surveillance Technologies Eliminate Deviance?

If you went about life knowing that a camera would record all your activities, would this knowledge encourage you to be a better rule follower? How about at work? Would it encourage you to do your job better, or to act in a more ethical manner? City officials in Oakland, California, and New York City seem to think so. In 2011, the Oakland police department mandated that its officers work with cameras attached to their bodies to document arrests and traffic stops (Goode, 2011). Similarly, the tragic death of Eric Garner in 2014 at the hands of New York City police officers led New York's public to call for the use of body cameras for the NYPD (Glenza, 2011; James, 2014). In both cases, officials hoped that body cameras would hold police accountable for their actions, address citizen concerns about abuse of power, and encourage more consistent adherence to codes of police behavior.

To sociologists, these cases raise a broader question about the relationship between deviance and privacy. In the absence of privacy—the assurance that you can go about your life without having a record of all your actions—is it possible to be anything *but* a rule follower? Further, if everyone is a rule follower, does this lead to a safer or more equitable society?

Based on our earlier discussions of crime prevention, you might be tempted to conclude that societies are always better off when people follow the rules. However, in some cases, not complying with the rules may facilitate social interactions, reduce power inequalities, or enable positive social change. Consider as an example, social movements like the Arab Spring, where defiance of the law enabled individuals to demand democracy and respect for human rights. If constant government surveillance had made it impossible for these individuals to break rules and engage in politically subversive acts, democratic movements in Egypt, Tunisia, Libya, and elsewhere might never have occurred.

You might also think back to the example used in the introduction of this chapter in which Mafia members broke the law in order to ultimately enter mainstream society. If the police had had access to a detailed record of all criminal activities linked to the Lupollo clan, the family might

never have succeeded in becoming respectable. For the Lupollos, strict adherence to the rules might have offered fewer opportunities for upward mobility.

Finally, in everyday life, think about the role of white lies, or lies by omission, when speaking with someone you have only just met. On first dates, or at meetings with potential employers—where stakes of the interaction are high—we may smooth social interactions by obscuring or selectively revealing the truth. In many ways, falsehoods and deviance from normative behavior are important in social life, helping us navigate new, complex social situations (Levy, 2014).

This discussion is particularly relevant in the context of recent revelations of surveillance and wiretapping conducted by the National Security Agency and other state bodies. Even data collection by private firms like Meta and Google has raised new concerns about a citizen's right to privacy in the contemporary age. If the government and large corporations have the ability to track your movements, what you say online, and even what you say to close friends and family, is it still possible to be a rule breaker and deviate from norms in ways that may be conducive to social life?

On the one hand, new technologies can lead to what some legal scholars have referred to as "gap closure"—or the more thorough enforcement of laws regulating our conduct. Instead of hiring a police officer to watch an intersection all day and ticket people who run red lights, it may be more efficient to install a camera that can impartially capture all the rule breakers. The absence of human bias in law enforcement could lead to a more exact correspondence between laws and intended behaviors. However, as we have noted, the imperfect realization of certain norms may actually serve important social functions. What's more, "closing" the gap between certain rules and social expectations may lead to the rise of new gaps, perhaps in the ways that we interface with technologies or circumvent them to go about our lives (Levy, 2014).

# Can We Prevent Crime by Building Stronger Communities?

Preventing crime and reducing fear of crime are both closely related to rebuilding strong communities. As we saw in our earlier discussion of the broken windows theory, one of the most significant discoveries in criminology in recent years is that the decay of day-to-day civility relates directly to criminality. For a long time, attention was focused almost exclusively on serious crime: robbery, assault, and other violent crime. More minor crimes and forms of public disorder, however, tend to have a cumulative effect. When asked to describe their problems, residents of troubled neighborhoods mention abandoned cars, graffiti, prostitution, youth gangs, and similar phenomena.

People act on their anxieties about these issues; they leave the areas in question if they can, buy heavy locks for their doors and bars for their windows, and abandon public places like parks. Fearful citizens stay off the streets, avoid certain neighborhoods, and curtail their normal activities and associations. As they withdraw physically, they also withdraw from roles of mutual support for fellow citizens, thereby relinquishing the social controls that formerly helped maintain civility within the community.

## Community Policing

One popular idea to combat this development is to have police work closely with citizens to improve local community standards and civil behavior, using education, persuasion, and counseling instead of incarceration. Community policing implies not only involving citizens but also changing the outlook of police forces. A renewed emphasis on crime prevention rather than law enforcement can support a reintegration of policing with the community and reduce the siege mentality that develops when police have little regular contact with ordinary citizens.

To be effective, partnerships among government agencies, the criminal justice system, local associations, and community organizations have to include all economic and ethnic groups (Kelling & Coles, 1997). Government and business can act together to repair urban decay. One model is the creation of urban enterprise zones, which provide tax breaks for corporations that participate in strategic planning and invest in designated areas. To be successful, such schemes demand a long-term commitment to social objectives.

Emphasizing these strategies does not mean denying the links among unemployment, poverty, and crime. Rather, when coordinated with community-based approaches to crime prevention, these approaches can contribute directly and indirectly to furthering social justice. Where social order has decayed along with public services, other opportunities, such as new jobs, decline also. Improving the quality of life in a neighborhood by providing job opportunities and public services can lead to a revival of such areas.

Former Tampa police chief Jane Castor greets community members during the National Night Out, an initiative that fosters citizen involvement in crime prevention.

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## Shaming as Punishment

The current emphasis on imprisonment as a means of deterring crime can cripple the social ties within certain communities. In recent years, shaming—a form of punishment that maintains the offender's ties to the community—has grown in popularity as an alternative to incarceration. Some criminologists see the fear of being shamed within one's community as an important deterrent to crime. As a result, the public's formal disapproval could deter crime as effectively as incarceration, without the high costs of building and maintaining prisons.

Criminologist John Braithwaite (1996) has suggested that shaming practices can take two forms: “reintegrative shaming” and “stigmatizing shaming.” Stigmatizing shaming is related to labeling theory, discussed earlier, by which a criminal is labeled as a threat to society and is treated as an outcast. The labeling process and society’s efforts to marginalize the individual reinforce that person’s criminal conduct, perhaps leading to future criminal behavior and higher crime rates.

The very different practice of reintegrative shaming works as follows: People central to the criminal’s immediate community—such as family members, employers and coworkers, and friends—are brought into court to state their condemnation of the offender’s behavior. At the same time, these people must accept responsibility for reintegrating the offender back into the community. The goal is to rebuild the individual’s social bonds to the community as a means of deterring future criminal conduct.

Japan, with one of the lowest crime rates in the world, has successfully implemented this approach. The process is based on a voluntary network of more than 500,000 local crime-prevention associations dedicated to facilitating reintegration into the community and on a criminal justice system that attempts to be lenient for this purpose. As a result, in Japan only 5 percent of convicted individuals serve time in prison, compared with 30 percent in the United States. Reintegrative shaming is already a familiar practice in American social institutions such as the family. When a child misbehaves, the parent may express disapproval and try to make the child feel ashamed of her conduct but, at the same time, reassure her that she is a loved member of the family.

Could reintegrative shaming succeed in the U.S. criminal justice system? In spite of the beliefs that these tactics are “soft” on crime, that Americans are too individualistic to participate in community-based policing, and that high-crime areas are less community oriented, community networks have successfully worked with the police in preventing crime. These social bonds could also be fostered to increase the power of shame and to reintegrate offenders into local networks of community involvement.

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**CONCEPT CHECKS**

1. **Name three explanations for declining crime rates in the United States.**
2. **According to Victor Rios, why are policies like stop and frisk problematic?**
3. **What are police officers' primary tasks each day?**
4. **What are two specific ways by which community members can combat local crime?**

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# Glossary

community policing
: An approach to policing that emphasizes crime prevention rather than law enforcement to reintegrate policing within the community.

shaming
: A way of punishing criminal and deviant behavior based on rituals of public disapproval rather than incarceration. The goal of shaming is to maintain the ties of the offender to the community.

# THE BIG PICTURE

# Chapter 7

## Deviance, Crime, and Punishment

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**Exercises:** Thinking Sociologically

1. Summarize several leading theories explaining crime and deviance presented in this chapter: differential association, anomie, labeling, conflict, and control theories. Which theory appeals to you the most? Explain why.
2. Explain how differences in power and social influence can play a significant role in defining and sanctioning deviant behavior.

# BASIC CONCEPTS p. 203

## Learning Objectives

Learn how we define deviance and how it is related to social power and social class. Recognize the ways in which we encourage conformity.

## Terms to Know

norms • deviance • deviant subculture • sanction • laws • crime

## Concept Checks

1. How do sociologists define deviance?
2. Is all crime deviant? Is all deviance criminal? Why?
3. Contrast positive and negative sanctions.

# SOCIETY AND CRIME: SOCIOLOGICAL THEORIES p. 206

## Learning Objectives

Know the leading sociological theories of crime and how each is useful in understanding deviance.

## Terms to Know

anomie • relative deprivation • differential association • labeling theory • primary deviation • secondary deviation • conflict theory • control theory

## Concept Checks

1. How do Merton's and Durkheim's definitions of anomie differ?
2. What is the core idea behind differential association theory?
3. What are two criticisms of labeling theory?
4. What are the root causes of crime, a ccording to conflict theorists?
5. How does the theory of broken windows exemplify the core ideas of control theory?

# RESEARCH ON CRIME AND DEVIANCE TODAY p. 216

## Learning Objectives

Recognize the usefulness and limitations of crime statistics. Understand that some individuals or groups are more likely than others to commit, or be the victims of, crime. Familiarize yourself with some of the varieties of crime.

### Terms to Know

white-collar crime • corporate crime • cybercrime

### Concept Checks

1. How does Devah Pager's study of former inmates support Michelle Alexander's argument that mass incarceration has created a new caste system in the United States?
2. According to David Garland, what accounts for the continued use of capital punishment in the United States?
3. Contrast the following two explanations for the gender gap in crime: behavioral differences and biases in reporting.
4. What are some consequences of white-collar crime?

## UNANSWERED QUESTIONS p. 230

### Learning Objectives

Explore the different explanations for the decline in overall crime between the 1990s and present. Think about the best solutions to reduce crime. Consider the ways in which individuals and governments can address crime.

### Terms to Know

community policing • shaming

### Concept Checks

1. Name three explanations for declining crime rates in the United States.
2. According to Victor Rios, why are policies like stop and frisk problematic?
3. What are police officers' primary tasks each day?
4. What are two specific ways by which community members can combat local crime?

# Glossary

norms
: Rules of conduct that specify appropriate behavior in a given range of social situations. A norm either prescribes a given type of behavior or forbids it. All human groups follow definite norms, which are always backed by sanctions of one kind or another, varying from informal disapproval to physical punishment.

deviance
: Modes of action that do not conform to the norms or values held by most members of a group or society. What is regarded as deviant is as variable as the norms and values that distinguish different cultures and subcultures from one another. Forms of behavior that are highly esteemed by one group may be regarded negatively by others.

deviant subculture
: A subculture whose members hold values that differ substantially from those of the majority.

sanction
: A mode of reward or punishment that reinforces socially expected forms of behavior.

laws
: Rules of behavior established by a political authority and backed by state power.

crime
: The result of any action that contravenes the laws established by a political authority.

anomie
: A concept first brought into wide usage in sociology by Émile Durkheim to refer to a situation in which social norms lose their hold over individual behavior.

relative deprivation

Deprivation one feels by comparing oneself with a group.

differential association

An interpretation of the development of criminal behavior proposed by Edwin H. Sutherland, according to whom criminal behavior is learned through association with others who regularly engage in crime.

labeling theory

An approach to the study of deviance that suggests that people become “deviant” because certain labels are attached to their behavior by political authorities and others.

primary deviation

According to Edwin Lemert, the actions that cause others to label one as a deviant.

secondary deviation

According to Edwin Lemert, following the act of primary deviation, secondary deviation occurs when an individual accepts the label of deviant and acts accordingly.

conflict theory

The argument that deviance is deliberately chosen and often political in nature.

control theory

The theory that crime is the outcome of an imbalance between impulses toward criminal activity and controls that deter it. Control theorists hold that criminals are rational beings who will act to maximize their own reward unless they are rendered unable to do so through either social or physical controls.

white-collar crime

Criminal activities carried out by those in white-collar, or professional, jobs.

corporate crime

Offenses committed by large corporations in society. Examples of corporate crime include pollution, false advertising, and violations of health and safety regulations.

cybercrime

Criminal activities by means of electronic networks or information technologies. Electronic money laundering, personal identity theft, electronic vandalism, and monitoring electronic correspondence are all emergent forms of cybercrime.

community policing

An approach to policing that emphasizes crime prevention rather than law enforcement to reintegrate policing within the community.

shaming

A way of punishing criminal and deviant behavior based on rituals of public disapproval rather than incarceration. The goal of shaming is to maintain the ties of the offender to the community.

# PART III Structures of Power

**Power is an ever-present phenomenon in social life. In all human groups, some individuals have more authority or influence than others, and groups themselves have varying degrees of power. Power and inequality are closely linked. The powerful are able to accumulate valued resources, such as property and wealth; possession of such resources in turn generates more power.**

**In this part, we explore some of the main systems of power and inequality. Chapter 8 discusses stratification and class structure—the ways in which inequalities are distributed within societies. Chapter 9, on global inequality, examines the ways in which inequalities are distributed across societies. Chapter 10 analyzes the differences and inequalities between men and women and how these inequalities are related to others based on class and race. Chapter 11, on ethnicity and race, examines the tensions between people who are physically or culturally different from one another. Chapter 12 discusses the experience of growing old and analyzes related social problems.**

**Chapter 13 examines the state, political power, and social movements. Governments are specialists in power; they are the source of the directives that influence many of our daily activities. However, they are also the focus of resistance and rebellion, political action that can lead to political and social change.**

# 8 Stratification, Class, and Inequality

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Rising prices are a fact of life. When purchases for food, clothing, shelter, and other items are taken into account, it would cost $163 today to buy what cost $100 only 20 years ago (U.S. Bureau of Labor Statistics [BLS], 2023b). The federal minimum wage is intended to at least partially protect wage earners from inflation, by setting a national floor on what workers must be paid. As the cost of living goes up, the federal minimum wage has been periodically increased as well. During the past 20 years, the federal minimum wage has

1. **pretty much kept pace with inflation.**

2. **gone up faster than inflation to protect workers from wage cuts during Covid-19.**
3. **lagged behind inflation.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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**LEARNING OBJECTIVES**

1. **Basic Concepts** Learn about social stratification and the importance of social background in an individual's chances for material success.
2. **Theories of Stratification in Modern Societies** Know the most influential theories of stratification, including those of Karl Marx, Max Weber, and Erik Olin Wright.
3. **Research on Social Stratification Today** Know the class differences in U.S. society, what influences them, and how they are defined and determined. Recognize the ways in which the gap between rich and poor has grown larger. Learn the processes by which people become marginalized in a society and the forms this marginalization takes.
4. **Unanswered Questions** Learn about competing explanations for why poverty exists and the means for combating it. Understand your own chances for social mobility. Learn how changes in the U.S. economy since the 1970s have led to growing inequalities.

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The federal minimum wage, the legal floor for wages in the United States, was first set in 1938 at $0.25 an hour. Although the federal minimum wage has increased over the years, it has failed to keep up with inflation. Its most recent increase, to $7.25 per hour, was in 2009. Since that time the cost of living has gone up by 40 percent. In terms of purchasing power, $7.25 has declined in value to $5.24 over the past 15 years.

For a full-time wage earner, the minimum wage works out to roughly $15,000 a year—barely above the federal poverty level in 2020 for a single person under 65 ($13,465), and well below the poverty level if the worker is, for example, a single woman supporting one child ($17,839) or two children ($20,852) (Congressional Research Service [CRS], 2022). Because the federal minimum wage is so low—and because the cost of living is higher in some places than in others—32 states have set their

own minimum wages, ranging from $8.75 an hour in West Virginia to $16.10 in the District of Columbia. More than 80 cities and counties have also set higher minimums; three out of five are in California, reflecting the high cost of living in many of California's coastal cities (Labor Law Center, 2023).

The minimum wage is intended to soften the effects of inequality in American society—the fact that while some Americans are billionaires many times over, many others can barely scrape by. In this chapter, we will introduce a key concept of sociology: social stratification. By this we mean inequalities among individuals and groups that are determined not so much by individual personality or small-scale social situations but, more broadly, by attributes such as gender, age, race, or ethnicity. The study of the interacting effects of these different sources of inequality, and the resulting experiences of oppression, is termed intersectionality. We will focus on stratification with regard to societal inequalities based on social class—aspects of wealth, income, education, and lifestyle—although we will touch on gender, racial, and ethnic differences as well. In later chapters, we will consider more directly how gender and sexuality (Chapter 10), race and ethnicity (Chapter 11), and age (Chapter 12) contribute to stratification.

Individuals and groups enjoy unequal access to rewards depending on their position within the larger stratification scheme. Stratification can thus be defined as structured inequalities between and among groups of people belonging to different classes, races, and genders. Sociologists see these inequalities as built into the economic and political system. While individual differences (for example, in talent or effort), or just plain luck (such as winning the lottery), may affect one's socioeconomic position, the existing stratification system plays a key role in shaping one's economic opportunities.

# Glossary

social stratification
: The existence of structured inequalities between groups in society in terms of their access to material or symbolic rewards. While all societies involve some forms of stratification, only with the development of state-based systems did wide differences in wealth

and power arise. The most distinctive form of stratification in modern societies is class divisions.

intersectionality

A sociological perspective that holds that our multiple group memberships affect our lives in ways that are distinct from single group memberships. For example, the experience of a Black woman may be distinct from that of a White woman or a Black man.

structured inequalities

Social inequalities that result from patterns in the social structure.

# 1 BASIC CONCEPTS

**Learn about social stratification and the importance of social background in an individual's chances for material success.**

## Systems of Stratification

Historically, a few basic systems of stratification have existed in human societies: slavery, caste, and class. Slavery is an extreme form of inequality in which some individuals are literally owned by others as property. Enslaved Africans played a key role in economic growth, providing the labor required to plant, cultivate, and harvest cotton, tobacco, sugar, and other crops that were key engines of not only U.S. economic development but also world development in the nineteenth century (Beckert, 2015). Slavery was abolished in the United States in 1865 with the ratification of the Thirteenth Amendment to the U.S. Constitution. Today slavery is illegal in every country, although trafficking of slave labor can still be found: The International Labour Organization (ILO) estimates that 28 million people globally are doing forced labor on any given day, in such areas as manufacturing, construction, agriculture, domestic work, and sex work (ILO, 2022; Patterson & Zhuo, 2018).

Women from the Dalit caste (formally known as *untouchables*) earn a living as sewage scavengers in the slums of Ranchi, India, retrieving human waste from residential dry latrines and emptying the buckets into nearby gutters and streams.

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Caste is a social system usually associated with India and the Hindu belief in rebirth. In India's caste system, which dates back thousands of years, one's social status is held for life. This means that all individuals must remain at the social level of their birth throughout their lives. According to traditional Hindu belief, individuals who fail to abide by the rituals and duties of their caste will be reborn in an inferior position in their next life. Although the Indian Constitution prohibits discrimination based on caste, caste still often structures the type of contact that can occur between members of different ranks (Sahgal et al., 2021). Although the United States does not have a religiously sanctioned caste system, some scholars have argued that our system of stratification, in which race

and ethnicity play central roles, is best understood as a caste system. In her book *Caste: The Origins of Our Discontents*, Isabel Wilkerson (2020) argues that the notion of caste is far older than the relatively modern notion of race, and points to the underlying social structure that shapes our ideas about race and racial differences (p. 17). Caste, as she describes it, is an artificial ranking based on the belief that one group is superior to another because of ancestry or fixed characteristics, such as perceived racial traits. In this sense, a race-based stratification system is in fact a caste system.

Class systems differ in many respects from slavery and castes. We can define a class as a large-scale grouping of people who share common economic resources that strongly influence the type of lifestyle they are able to lead. The concept of life chances, introduced by Max Weber, is the best way to understand what class means. Your life chances are the opportunities you have for achieving economic prosperity. The idea of life chances is important because it emphasizes that although class is a powerful influence on what happens in our lives, it is not completely determining. Class divisions affect which neighborhoods we live in, what lifestyles we follow, and even which romantic partners we choose (Lens, 2022; Massey & Brodmann, 2014). But they don't fix people for life in specific social positions, as the older systems of stratification did. Class systems differ from slavery and castes in four main ways: Class systems are more fluid, and some movement is possible; positions are partly achieved; classes are economically based; and class systems are large scale and impersonal. The chief bases of class are income, ownership of wealth, education, occupation, and lifestyle.

Let's begin our exploration of classes in modern societies by looking at basic divisions of income, wealth, educational attainment, and occupational status within the population as a whole.

## Income

Income refers to wages and salaries earned from paid occupations, plus unearned money such as interest, or an increase in the value of investments in such things as real estate or stocks. One of the most significant changes over the past century has been the rising real income of the majority of the working population. (*Real income* is income

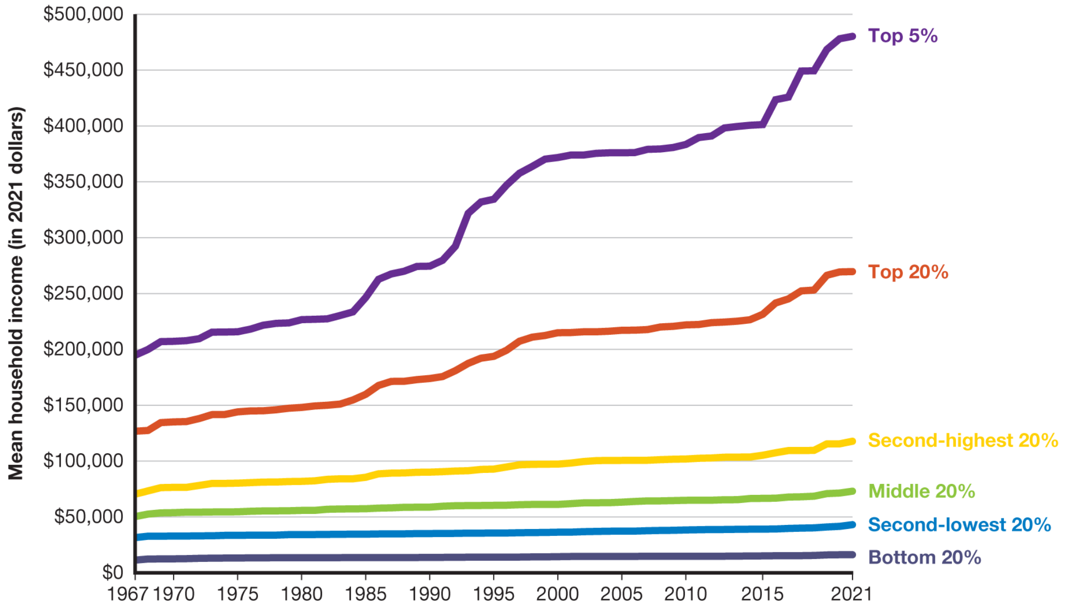
excluding increases due to inflation, and provides a fixed standard of comparison from year to year.)

Blue-collar workers, who typically perform physical labor such as manufacturing or construction work, now earn three to four times as much in real income in Western societies as their counterparts earned in the early 1900s, although they have seen their real income drop in the first two decades of the twenty-first century. Gains for managerial and professional workers, often known as "white-collar workers," have been higher still. In terms of earnings per person (per capita) and the range of goods and services their earnings can purchase, many Americans today are more affluent than any peoples have previously been in human history. One of the most important reasons for this is "increasing productivity"—output per worker—through technological development in industry. Another reason is that almost everything we consume is now made in countries where wages are extremely low, keeping costs (and therefore prices) down. While this situation has been good for American consumers, it has not been so good for American workers, as we shall see later in this chapter, as well as in Chapters 9 and 14.

Even though real income has risen in the past century, these earnings have not been distributed evenly across groups. In other words, not everyone has shared equally in the growing productivity of the U.S. economy. Since the 1970s, income inequality has been increasing dramatically. It is currently greater than at any time since 1928, the year before the Great Depression, which wiped out much of the wealth in the country and left millions unemployed. The Depression led to government policies aimed in part at protecting working- and middle-class Americans. President Franklin Delano Roosevelt's New Deal, which created Social Security, welfare protections for the poor, housing, and many public works, resulted in the redistribution of income from the wealthiest Americans to working-class Americans, thereby somewhat reducing inequality. By the end of the 1970s, however, inequality once again began to increase, and markedly so. Between 1976 and 2022, the average real income of the bottom half of U.S. households grew by 21 percent (**Figure 8.1**). In contrast, the income of the top 10 percent jumped 135 percent, and for the superrich—the top 0.1 percent—491 percent. In 2022, the average real income of the superrich ($51 million) was 2,500 times greater than that of the bottom half of U.S. households ($20,300) (Blanchet et al., 2023).

Figure 8.1

**MEAN HOUSEHOLD INCOME BY INCOME GROUP, 1967–2021**




Note: The top 5% is also included within the top 20%.

Source: Semega & Kollar, 2022b.

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# Wealth

One reason for the growing disparity between the incomes of most U.S. households and the richest households is that the incomes of the richest—unlike the incomes of most Americans—are likely to include significant returns from different forms of wealth. Wealth is usually measured in terms of net worth: all the assets one owns (for example, cash; saving and checking accounts; and investments in stocks, bonds, pensions, and real estate properties) minus one's debts (for example, home mortgages, credit card balances, and loans that need to be repaid). Elon Musk, ranked the richest person in the world in early 2022, had an estimated net worth of $219 billion, derived largely from the stock market value of Tesla, SpaceX, and other companies he cofounded. Like others of the superrich cohort, his fortunes mushroomed during the past three years; two years earlier, in 2020, his wealth was estimated at only 25 billion (*Forbes*,

2023a). In fact, according to some studies, of $42 trillion in new wealth created between 2020 and 2023, the richest 1 percent accounted for nearly two-thirds. Covid-19, which shuttered workplaces and resulted in widespread layoffs for working people, resulted in an inflationary surge in energy, food, and other products leading to windfall profits (and high returns on investments) in those industries (Oxfam, 2023).

It is extremely difficult to get a truly accurate measure of wealth in the United States because the wealthiest Americans have ways of effectively hiding their wealth through trusts and foundations, as well as offshore tax havens and other tax shelters. Nonetheless, some highly detailed (and mathematically sophisticated) efforts have recently been made to get a better picture of trends in wealth concentration (Saez & Zucman, 2016, 2020, 2022). This research finds that trends in wealth inequality parallel those with income inequality: The rich are getting much, much wealthier relative to everyone else, mainly due to soaring top incomes. In the 1920s, before the Great Depression, the bottom 90 percent of Americans accounted for one-fifth of total wealth in the United States. In the mid-1980s, their share had risen to more than a third, but today, it has dropped to under a quarter. The vast majority of Americans are saddled with unpaid credit cards, and many owe money for student loans, automobiles, and home mortgages.

The type of wealth one has also differs between the very rich and everybody else. Although most people make money from work, the wealthy often derive the bulk of their money from their investments, some of which may be inherited. Some scholars argue that wealth, not income, is the real indicator of social class because it is less sensitive to fluctuations due to shifting work hours, health, and other factors that might affect one's income in a given year. Much of the wealth of the wealthy lies in financial assets such as stocks, bonds, mutual funds, and other forms of investment, whereas for most Americans, their home is the principal form of wealth. For households whose net worth is in excess of $500,000, financial assets account for 75 percent of all wealth; only 13.5 percent comes from their homes. For all other households, homes account for more than half of their wealth, with only a third coming from financial assets (Board of Governors of the Federal Reserve System, 2020; Shorrocks et al., 2019a).

Today, the average net worth of all American families is only $97,300, while the average net worth of the top 10 percent has grown to $1.6

million, the top 1 percent to $4 million, and the top 0.1 percent to $111 million (Board of Governors of the Federal Reserve System, 2020; Gold, 2017). Stated somewhat differently, the wealthiest 0.1 percent of Americans (160,700 families) have about as much wealth as the bottom 90 percent (144 million families) (Saez & Zucman, 2016). There are significant differences in net worth by race. The median net worth of White households was $171,000 in 2016, compared to $17,600 for Black households (Dettling et al., 2017).

What are some of the reasons for the racial disparity in financial assets? The old adage "It takes money to make money" is a fact of life for those who start with little or no wealth. Because Whites, on average, have enjoyed higher incomes and levels of wealth than Blacks have, many Whites can accrue even more wealth, which they pass on to their children (Conley, 1999). But family advantages are not the only factors. Government policies have historically made it more difficult for Blacks to build wealth through home ownership. In the 1950s, federal home loan guarantees, which led to the postwar boom in suburban housing construction, contained clauses limiting resale to Whites only. Local rezoning often allowed industrial uses in Black neighborhoods, depressing property values and turning once viable communities into slums (Rothstein, 2017) (see Chapter 19).

The 2008 subprime mortgage crisis left many Americans bankrupt. Blacks, Hispanics, and those living in the inner city were most likely

to lose their homes.

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Melvin Oliver and Thomas Shapiro (2006) argued that discrimination still affects the racial gap in home ownership. Blacks are rejected for mortgages 60 percent more often than Whites are, even when they have the same qualifications and creditworthiness. One study found that in 2016 Blacks were denied loans 21 percent of the time while Whites were denied 8.1 percent of the time (Yale, 2018). When Blacks do receive mortgages, they are more likely to take "subprime" mortgage loans that charge much higher interest rates. In 2006, of those who took out home loans, 30 percent of Black home buyers took out subprime loans, compared with 24 percent of Hispanic and 18 percent of White home buyers. Blacks and Hispanics were therefore especially hard hit by the recession of 2007–2009; many were forced to default on their mortgage payments and, in many cases, lost their homes. Research shows that only a few lenders offer subprime loans, but those lenders focus on minority communities, whereas the prime lenders are unable or unwilling to lend in those communities (Avery et al., 2005). According to a *New York Times* analysis of mortgage lending in New York City, Black households making more than $68,000 a year were nearly five times as likely to hold high-interest subprime mortgages as Whites of similar or lower income levels (Powell, 2009). Furthermore, the National Bureau of Economic Research conducted a study that showed that Black home buyers were 103 percent more likely than White home buyers to have high-cost home mortgages and Hispanic home buyers were 78 percent more likely than White home buyers (Bayer et al., 2018). These issues are particularly important because home ownership constitutes American families' primary means of accumulating wealth.

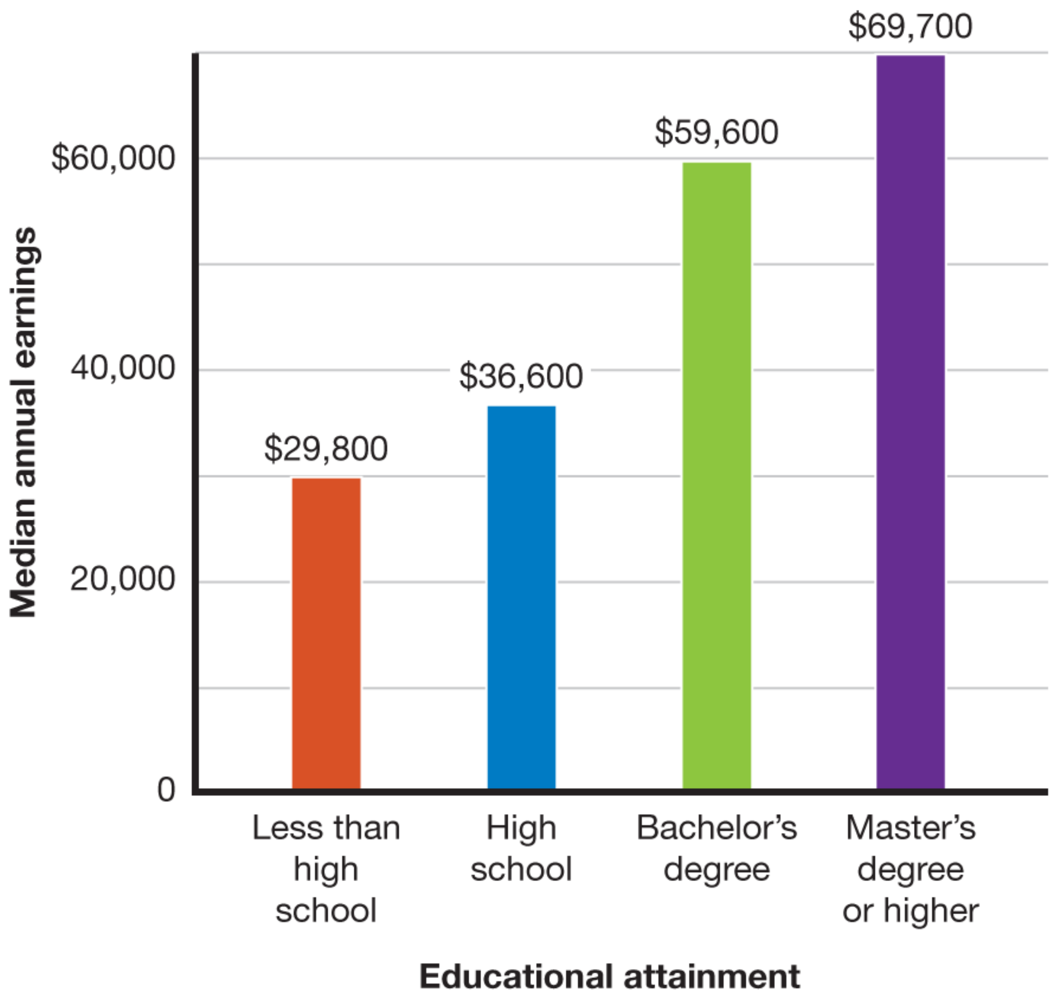
Financial assets are important because they provide a major source of funding if one wants to start a business or pay for a college education. For lower-income Americans (a group that includes many minorities), accumulating stocks or bonds in the hope of cashing them in to pay for their children's college education is not even a fantasy. In fact, it is more likely that people in this group owe far more than they own. In recent years, as credit has become more readily available, many Americans have gone increasingly into debt, using credit cards and refinancing their home mortgages to pay for their lifestyles rather than relying on their earnings. Total household debt reached $16.5 trillion in 2022, including $11.7

trillion for home mortgages, $0.9 trillion in credit card payments, $1.5 trillion in automobile loans, and $1.6 trillion in student loans (Federal Reserve Bank of New York, 2022a, 2022b).

Wealth is even more unequal globally. There were reportedly 2,668 billionaires in the world by the end of 2022, with a combined net worth of more than $12.7 trillion (*Forbes*, 2023b). According to some estimates, the wealthiest 1 percent now account for almost half of all global wealth (Shorrocks et al., 2022a, p. 21). We'll come back to this topic in Chapter 9.

Figure 8.2

**MEDIAN EARNINGS OF YOUNG ADULTS, 2020**




Note: Represents median annual earnings of full-time, year-round workers ages 25–34.

Source: NCES, 2022a.

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## Education

One thing that pays off in terms of income and wealth is a college education. In fact, education is one of the strongest predictors of occupation, income, and wealth later in life. In 2020, the median income of millennials (25 to 34 years old) with bachelor's degrees and full-time jobs was $59,600, compared to $36,600 for those who only graduated from high school, a gap of 63 percent (National Center for Education Statistics [NCES], 2022h) (see Figure 8.2). Moreover, the return on a college education has increased considerably over time: In 1980, for example, the income gap between those with a college degree and those with a high school diploma was only 27 percent; by 2021, the gap had widened to nearly 50 percent (Economic Policy Institute, 2022). In fact, over the long run, if one estimates the lifetime earnings of college graduates and subtracts the costs of going to college, the benefits outweigh the costs by a half million dollars on average (Autor, 2014).

A college education also pays off in terms of wealth. The median net worth of households headed by someone with a bachelor's degree was $163,700 in 2016, compared to $38,900 for households headed by someone with only a high school diploma (Eggleston & Hays, 2019). For households headed by high school dropouts, the difference is even more pronounced; the median net worth is $4,900. While a few exceptional individuals may drop out of college and go on to become billionaires (Microsoft's Bill Gates, Apple's Steve Jobs, and Facebook's Mark Zuckerberg come to mind), the chances of following in their footsteps are about as likely as those of becoming a billionaire rock star or professional athlete. Importantly, if you start college, it pays to finish your degree: The median net worth of households headed by someone who dropped out of college is the same as for those headed by someone with a high school diploma (U.S. Bureau of the Census, 2017c).

While college graduates earn an average of $1 million more than high school graduates over the course of their careers, earnings vary widely by major. A recent study by the Center on Education and Workforce at Georgetown University compared 137 college majors and found that petroleum engineering students have the highest average annual salary,

$176,000, while vocational rehabilitation majors earn the least, at $42,300 per year (Payscale, 2019).

Does it matter which college you go to (Hershbein, 2013; Hoxby, 2009)? It is hardly surprising that students who attend more selective, higher-quality colleges have, on average, higher lifetime earnings. But is this because students acquire superior skills at such schools or because such schools tend to admit higher-ability students who are more likely to become more productive workers regardless of where they go? While college quality (at least as measured by the college's average SAT scores) clearly matters in terms of postcollege earnings, one study found that once student ability (as measured by the student's average SAT scores) is taken into account, college quality ceases to be a significant predictor of postcollege earnings, at least for most White students. For Black, Hispanic, female, and White students whose parents lack a college degree, going to a high-quality college does make a difference—possibly because of the networking opportunities such colleges provide (Dale & Krueger, 2014; Ge et al., 2018). Racial differences in levels of education persist, which partly explains why racial differences in income and wealth persist as well. In 2018–2019, the high school graduation rate was 93 percent for Asian students and 89 percent for White students but just 80 percent for Black students and 82 percent for Hispanic students (NCES, 2022e). Importantly, as we will see later in this chapter, how much education one receives is often influenced by the social class of one's parents.

## Occupation

In the United States and other industrialized societies, occupation is an important indicator of social standing. According to studies in which people rate jobs in terms of how "prestigious" they are, those requiring the most education are often—but not always—ranked most highly (**Table 8.1**). The top-ranked occupations appear to share one of two characteristics: They require a fair amount of either education or public service. These rankings have been fairly consistent for nearly four decades (Griswold, 2014). There are some interesting differences by age, however. Millennials (born 1981–1996) seem more inclined than older Americans to value fame: Professional athletes, actors, and entertainers move up in the rankings (Harris Poll, 2014). Gen Zers (born after 1996) —a group that includes many of the readers of this textbook—are likely

to report concerns about climate change and general anxiety about the future (Tyson et al., 2021).

**Table 8.1 RELATIVE SOCIAL PRESTIGE OF SELECT U.S. OCCUPATIONS**

| **OCCUPATION** | **PRESTIGE SCORE** |
|---|---|
| Physician | 7.6 |
| Architect | 6.7 |
| Dentist | 6.7 |
| Airline pilot | 6.6 |
| Registered nurse | 6.5 |
| Lawyer | 6.4 |
| Veterinarian | 6.4 |
| Computer programmer | 6.0 |
| Secondary-school teacher | 6.1 |

| OCCUPATION | PRESTIGE SCORE |
|---|---|
| Sociologist | 6.1 |
| Police officer | 5.9 |
| Member of the clergy | 5.8 |
| Actor | 5.7 |
| Firefighter | 5.7 |
| Musician in a symphony orchestra | 5.6 |
| Electrician | 5.2 |
| Farm manager | 5.0 |
| Real estate agent | 4.9 |
| Carpenter | 4.6 |
| Auto body repairperson | 4.3 |

| OCCUPATION | PRESTIGE SCORE |
|---|---|
| Bank teller | 4.2 |
| Local delivery truck driver | 4.2 |
| Salesperson in a store | 3.9 |
| Hair stylist | 3.8 |
| Day-care aide | 3.6 |
| Waiter/waitress | 3.6 |
| Bartender | 3.6 |
| File clerk | 3.5 |
| Cashier in a supermarket | 3.4 |
| Taxi driver | 3.2 |
| Janitor | 3.0 |

| OCCUPATION | PRESTIGE SCORE |
|---|---|
| Door-to-door salesperson | 2.9 |

Note: Respondents were asked to rank the occupations' prestige on a scale of 1 to 9, with 1 as the least prestigious and 9 as the most prestigious.

Source: Smith & Son, 2014.

## Lifestyle

In analyzing class location, sociologists have traditionally relied on measures that are primarily economic, such as income or wealth. Some recent authors, however, seek to include cultural factors such as lifestyle and consumption patterns. According to this perspective, symbols and markers related to consumption are playing an ever-greater role in daily life. Individual identities are structured more around lifestyle choices—how to dress, what to eat, how to care for one's body, and where to relax—and less around traditional class indicators such as employment.

The French sociologist Pierre Bourdieu (1984, 1988) argued that among the factors responsible for social status, both social capital and cultural capital are important. Social capital refers to relational networks that provide a person with tangible resources (such as wealth) as well as intangible ones (such as personal connections when one seeks a job, or entrance into an elite university). Cultural capital refers to the cultural knowledge one possesses—the ways of speaking, acting, and presenting oneself—including credentials such as academic degrees or professional qualifications. Social and cultural capital typically go hand in hand; together they provide the relationships and convey to others one's social standing, helping to shape one's economic opportunities and prospects for social mobility. Even social networks play a role in developing the social and cultural capital that can contribute to social mobility. One recent study of 72 million Facebook users aged 25 to 44 found that friendship networks are likely to reflect one's social class, especially among the wealthy, whose networks are more likely to include their

college classmates than are the networks of people from those of middle- or working-class backgrounds (whose friendship networks tend to favor neighbors). The study concluded that the best predictor of social mobility was what the researchers termed "economic connectedness," the extent of friendships across class lines (Chetty et al., 2022a, 2022b). According to this research, who you know can matter—a lot.

Individuals thus distinguish themselves not only according to economic or occupational factors, but also on the basis of cultural tastes and leisure pursuits. Advertisers, marketers, fashion designers, style consultants, interior designers, personal trainers, and web page designers, to name but a few, are all involved in influencing cultural tastes and promoting lifestyle choices. Stratification thus depends not only on occupational differences but also on differences in consumption and lifestyle. The rapid expansion of the service economy and the entertainment and leisure industry, for example, reflects an increasing emphasis on consumption within industrialized countries. Modern societies have become consumer societies, and, in some respects, a consumer society is a "mass society" where class differences are overridden; thus, people from different class backgrounds may all watch similar television programs or shop for clothing in the same stores. Yet class differences can also become intensified through variations in lifestyle and "taste."

Despite the importance of cultural capital in signifying class, economic factors play a critical role in the reproduction of social inequalities. For the most part, individuals experiencing extreme social and material deprivations are not doing so as part of a lifestyle choice. Rather, their circumstances are constrained by factors related to the economic and occupational structure (Rank et al., 2003). Some Americans may not "choose" to buy clothes at Walmart and eat at McDonald's; they may simply be unable to afford to shop at higher-end stores and dine at gourmet restaurants.

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## CONCEPT CHECKS

1. **How is the concept of class different from that of caste?**
2. **What are the principal determinants of social stratification?**
3. **What is the difference between wealth and income, and why does it matter for social stratification?**

4. **What are two examples of noneconomic indicators of one's social class?**

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# Glossary

slavery
: A form of social stratification in which some people are owned by others as property.

caste
: A social system in which one's social status is held for life.

class system
: A system of social hierarchy that allows individuals to move among classes. The chief bases of class are income, ownership of wealth, education, occupation, and lifestyle.

class
: Although it is one of the most frequently used concepts in sociology, there is no clear agreement about how the notion of class should be defined. Most sociologists use the term to refer to socioeconomic variations between groups of individuals that create variations in their material prosperity and power.

life chances
: A term introduced by Max Weber to signify a person's opportunities for achieving economic prosperity.

income
: Money received from paid wages and salaries or earned from investments.

wealth
: Money and material possessions held by an individual or group.

social capital
: The relational networks that provide a person with tangible resources (such as wealth) and intangible ones (such as personal connections).

cultural capital
: The accumulated cultural knowledge within a society that confers power and status.

# 2 THEORIES OF STRATIFICATION IN MODERN SOCIETIES

**Know the most influential theories of stratification, including those of Karl Marx, Max Weber, and Erik Olin Wright.**

In this section, we look at some broad theories regarding stratification. Karl Marx and Max Weber developed the most influential approaches. Most contemporary theories of stratification are heavily indebted to their ideas.

## Marx: Capitalism and the Analysis of Class

For many people, the word *capitalism* refers to a free-market economy, a system in which economic exchanges are essentially deregulated and occur through supply and demand. In a capitalist system, wealth is privately owned and is invested and reinvested to produce profit. But for Marx and his followers, it is impossible to define capitalism without reference to the classes that emerge through capitalism.

Marx (1867/1977) was writing in the mid-nineteenth century, at a time when industrial production had emerged as the leading economic force. Factory working conditions were harsh, dangerous, and dehumanizing. Marx's analysis, which reflected these conditions, predicted that two great social classes were emerging based on their relationship to the means of production, the means by which they gained a livelihood: the bourgeoisie, or capitalists, who owned the means of production and therefore constituted a ruling class, and the proletariat, or working class, who, by contrast earned their living by selling their labor to the capitalists. The relationship between these two major classes, Marx argued, is exploitative. During the working day, workers produce more than employers actually need to repay the cost of hiring them. This

surplus value is the source of profit, which capitalists put to their own use—some may be reinvested in their businesses, but much is used to increase their personal wealth.

Marx believed that the maturing of industrial capitalism would create an increasing gap between the wealth of the minority and the poverty of the mass of the population. The wages of the working class could never rise far above subsistence level, while wealth would pile up in the hands of those owning capital. At the lowest levels of society, particularly among those frequently or permanently unemployed, there would develop an "accumulation of misery, agony of labor, slavery, ignorance, brutality, moral degradation" (Marx, 1867/1977). For all these reasons, Marx concluded, the working class would eventually rise up and overthrow the capitalist system that was oppressing them. This revolution would then usher in a classless society in which technology replaced much of human labor, with everyone working together for the common good. He termed this system communism, common ownership of the means of production.

Marx was right about the persistence of poverty in industrialized countries and in anticipating continued inequalities of wealth and income. He was wrong, however, in supposing that the income of most of the population would remain extremely low. Most people in Western countries today are much better off materially than were comparable groups in Marx's day. Even during times of great inequality—such as we see today in the United States—the vast majority do not live in poverty, although the economic security of many can be precarious: Economic growth is often followed by economic downturns and severe recessions. We have already noted that government policies, such as Roosevelt's New Deal, have provided a safety net for workers during difficult times. The harsh factory conditions that Marx predicted would mobilize workers in industrial countries have for the most part been exported to poor countries, where worker protests are harshly suppressed. We return to these issues in Chapters 13 and 14.

Marx was also wrong in believing that a classless society—a communist utopia in which everyone shared equally in the fruits of their common labor—would inevitably result. Today, more than a century and a half since the publication of his work, such a classless society has yet to make an appearance. The one major remaining society that self-identifies as communist—China—is far from the classless utopia Marx envisioned.

China's economy, a mixture of private enterprise and state economic control, has proven remarkably successful in raising the living standards of hundreds of millions of people, while elevating China to world power status. But China's state has hardly withered away. The Chinese Communist Party, which exerts a high level of control over all levels of government and much of the Chinese economy, has also asserted increasing control over many aspects of daily life, including the internet and social media. And inequality remains high in China—by some measures, it is higher than in the United States (Mazzocco, 2022).

# Weber: Class and Status

There are three main differences between Weber's theory and that of Marx. First, according to Weber, class divisions derive not only from control or lack of control of the means of production, but also from economic resources that have nothing to do with property. Such resources include people's skills and credentials. Those in managerial or professional occupations earn more and enjoy more favorable conditions at work, for example, than do people in blue-collar jobs. Their qualifications, such as degrees, diplomas, and skills they have acquired, make them more "marketable" than others without such qualifications. At a lower level, among blue-collar workers, skilled craft workers secure higher wages than do the semiskilled or unskilled.

Second, Weber distinguished another aspect of stratification, which he called "status." Status refers to differences among groups in the social honor, or prestige, that others accord them. Status distinctions can vary independently of class divisions. Social honor may be either positive or negative. For instance, doctors and lawyers have high prestige in American society. Pariah groups, on the other hand, are negatively privileged status groups subject to discrimination that prevents them from taking advantage of opportunities open to others. The Jews were a pariah group in medieval Europe, banned from participating in certain occupations and from holding official positions—as they were in Nazi Germany, from 1933 until Germany's defeat in World War II (1945).

Possession of wealth normally confers high status, but there are exceptions, such as rock stars who earn high salaries but may lack the education or social refinement typically associated with "status." In

Britain, individuals from aristocratic families enjoy social esteem even after their fortunes have been lost, but individuals with “new money” are often scorned by the well-established wealthy. Whereas class is an objective measure, status depends on people’s subjective evaluations of social differences. Classes derive from the economic factors associated with property and earnings; status is governed by the varying lifestyles that groups follow.

Third, Weber recognized that social classes also differ with respect to their power, or ability to enact change, command resources, or make decisions. Power is distinct from status and class, but these three dimensions often overlap. For example, on most college campuses, the president or provost has much greater power to change campus policies than does a professor.

Weber’s writings on stratification show that other dimensions besides class strongly influence people’s lives. Most sociologists hold that Weber’s scheme offers a more flexible and sophisticated basis for analyzing stratification than that provided by Marx.

# Davis and Moore: The Functions of Stratification

Kingsley Davis and Wilbert E. Moore (1945) provided a functionalist explanation for stratification, arguing that it has beneficial consequences for society. They claimed that certain occupations in society, such as brain surgeons, are functionally more important than others, and that these positions require special skills. However, only a few individuals have the talents or experience appropriate to these positions. To attract the most qualified people, rewards need to be offered, such as money, power, and prestige. Davis and Moore determined that because the benefits of different positions in any society must be unequal, all societies must be stratified. They concluded that social stratification and social inequality are functional because they ensure that the most qualified people, attracted by the rewards society bestows, will fill the roles that are most important to a smoothly functioning society.

Davis and Moore’s theory suggests that a person’s social position is based solely on innate talents and efforts. It is not surprising that other

sociologists have criticized their theory. For example, Melvin Tumin (1953) argued that the functional importance of a particular role is difficult to measure and that the social rewards bestowed on those in “important” roles do not reflect these people’s actual importance. For instance, who is more important, a lawyer or a schoolteacher? If, on average, a lawyer earns four or five times the amount that a schoolteacher earns, does that earning potential accurately reflect the lawyer’s relative importance to society?

Tumin also argued that Davis and Moore overlooked the ways in which stratification limits the discovery of talent in a society. As we have seen, the United States is not entirely a meritocratic society. Those at the top have special access to economic and cultural resources, such as the highest-quality education that helps transmit their privileged status from one generation to the next. For those—even those with superior talents—who lack access to these resources, social inequality is a barrier to reaching their full potential.

# Erik Olin Wright: Contradictory Class Locations

The career of the American sociologist Erik Olin Wright illustrates some of the most important changes in the U.S. class structure and system of inequality over the past half century. Influenced by the classical theories of Karl Marx, Wright was central to the creation of a group of scholars known as “no bullshit Marxists” who were interested in using empirical—largely quantitative—evidence to assess Marx’s ideas in light of the times in which research was taking place.

In the 1980s, Wright was the first to recognize that the massive expansion of the middle class in American society posed a problem for Marx’s theories because Marx viewed the class structure through the simple lens of owners and workers. Wright did not believe that middle-class people—and particularly the upper middle classes—could be understood using that classification. He argued, for example, that upper-middle-class people such as managers controlled the working class while being simultaneously controlled by capitalist owners. In other words,

these managers were essentially exploiting others while also being exploited.

This was a position that owed much to Marx but also incorporated ideas from Weber (see Table 8.2). According to Wright, there are three dimensions of control over economic resources in modern capitalist production, and these allow us to identify the major classes:

1. Control over investments or money capital
2. Control over the physical means of production (land or factories and offices)
3. Control over labor power

Members of the capitalist class have control over all of these dimensions of the production system. Members of the working class have control over none of them. Between these two main classes, however, are the groups whose position is more ambiguous: managers and white-collar workers. These people are in what Wright calls contradictory class locations, because they can influence some aspects of production but lack control over others. White-collar and professional employees, for example, must contract their labor power to employers to make a living, in the same way manual workers do. Yet they have a greater degree of control over the work setting than do most people in blue-collar jobs. Wright terms the class position of such workers “contradictory” because they are neither capitalists nor manual workers, yet they share certain common features with each.

**Table 8.2 APPLYING SOCIOLOGY TO STRATIFICATION**

| CONCEPTS | APPROACH TO INEQUALITY | CURRENT APPLICATION |
|---|---|---|

| CONCEPTS | APPROACH TO INEQUALITY | CURRENT APPLICATION |
|---|---|---|
| **Marxist theories** | The exploitation of working classes in capitalist societies is the key to understanding social and economic inequality in the contemporary world. | The presidential campaigns of Bernie Sanders, which gained wide traction in 2016 and 2020, were inspired in part by Marxist ideas. |
| **Weberian theories** | Status and power are as important as class in our understanding of social and economic inequality. | Journalists, writers, and scholars in an unequal society like the United States can hold status and exert power despite owning little capital. |

| CONCEPTS | APPROACH TO INEQUALITY | CURRENT APPLICATION |
|---|---|---|
| **Functionalist theories** | Inequality can be beneficial to society in so far as it inspires people to develop the skills and expertise necessary to excel at difficult jobs. | Entry-level jobs in computer science are among the best paid, resulting in wide income disparities between graduates in that field and those in most others. Computer science courses are among the most difficult at most universities, lending credence to a functional theory. |
| **Contradictory class locations (theory developed by Erik Olin Wright in the 1980s, when the middle class was at the height of its political power)** | Professional workers in modern capitalist society occupy contradictory positions: They exert control over the working classes but remain subordinate to the upper classes. | This theory is of less relevance today than when it was developed in the 1980s. As Erik Olin Wright has observed, both the working class and the shrinking, downwardly mobile middle class of the twenty-first century are losing power due to a "capitalist class . . . so immensely wealthy that they are capable of destroying the world as a side effect of their private pursuit of gain." |

A large segment of the population—85 to 90 percent, according to Wright (1997)—falls into the category of those who must sell their labor because they do not control the means of production. Yet within this population is a great deal of diversity, ranging from the traditional

manual working class to white-collar workers. To differentiate class locations within this large population, Wright considers two factors: the relationship to authority and the possession of skills or expertise. First, many middle-class workers, such as managers and supervisors, enjoy relationships to authority that are more privileged than those of the working class. Such individuals assist capitalists in controlling the working class by monitoring the work of other employees, for example, or by conducting personnel reviews and evaluations, and are rewarded by earning higher wages and receiving regular promotions. Yet these individuals remain under the control of the capitalist owners. In other words, they are both exploiters and the exploited.

The second factor that differentiates class locations within the middle classes is the possession of skills and expertise. According to Wright, middle-class employees possessing skills that are in demand in the labor market have a specific form of power in the capitalist system: They can earn a higher wage. The lucrative positions available to information technology (IT) specialists in the knowledge economy illustrate this point. Moreover, Wright argues, because employees with knowledge and skills are more difficult to monitor and control, employers secure their loyalty and cooperation by rewarding them accordingly.

Wright's ideas were central to carrying on the Marxist tradition through much of the past half century. Yet, toward the end of his life, Wright came to believe that a focus on the middle classes was no longer as important for Marxists. In an interview for this textbook, Wright said, "If I were to write a 50-page text on how to think about class in the twenty-first century, I would begin by saying the problem of class is not the problem of the poor, the working class, or the middle class. It's the problem of the ruling class—of a capitalist class that's so immensely wealthy that they are capable of destroying the world as a side effect of their private pursuit of gain."

Thus, in Wright's final studies, instead of focusing on the middle classes, he studied the democratization of the economy and the ruling class. His last book, published a few months after he passed away, was called *How to Be an Anticapitalist in the Twenty-First Century*.

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**CONCEPT CHECKS**

1. **According to Karl Marx, what are the two main classes, and how do they relate to each other?**
2. **What are the two main differences between Max Weber's and Karl Marx's theories of social stratification?**
3. **According to Kingsley Davis and Wilbert E. Moore, how does social stratification contribute to the functioning of society? What is wrong with this argument, according to Melvin Tumin?**
4. **What does Erik Olin Wright mean by "contradictory class location"? Give an example of a type of worker who falls into this category.**

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# Glossary

means of production
: The means whereby the production of material goods is carried on in a society, including not just technology but also the social relations between producers.

bourgeoisie
: People who own companies, land, or stocks (shares) and use these to generate economic returns.

proletariat
: People who sell their labor for wages, according to Karl Marx.

surplus value
: In Marxist theory, the value of a worker's labor power left over when an employer has repaid the cost of hiring the worker.

communism
: A social system based on everyone owning the means of production and sharing in the wealth it produces.

status
: The social honor or prestige a particular group is accorded by other members of a society. Status groups normally display distinct styles of life—patterns of behavior that the members of a group follow. Status privilege may be positive or negative.

pariah groups
: Groups who suffer from negative status discrimination—they are looked down on by most other members of society.

contradictory class locations

Positions in the class structure, particularly routine white-collar and lower managerial jobs, that share characteristics with the class positions both above and below them.

# 3 RESEARCH ON SOCIAL STRATIFICATION TODAY

**Know the class differences in U.S. society, what influences them, and how they are defined and determined. Recognize the ways in which the gap between rich and poor has grown larger. Learn the processes by which people become marginalized in a society and the forms this marginalization takes.**

## A Contemporary Portrait of the U.S. Class Structure

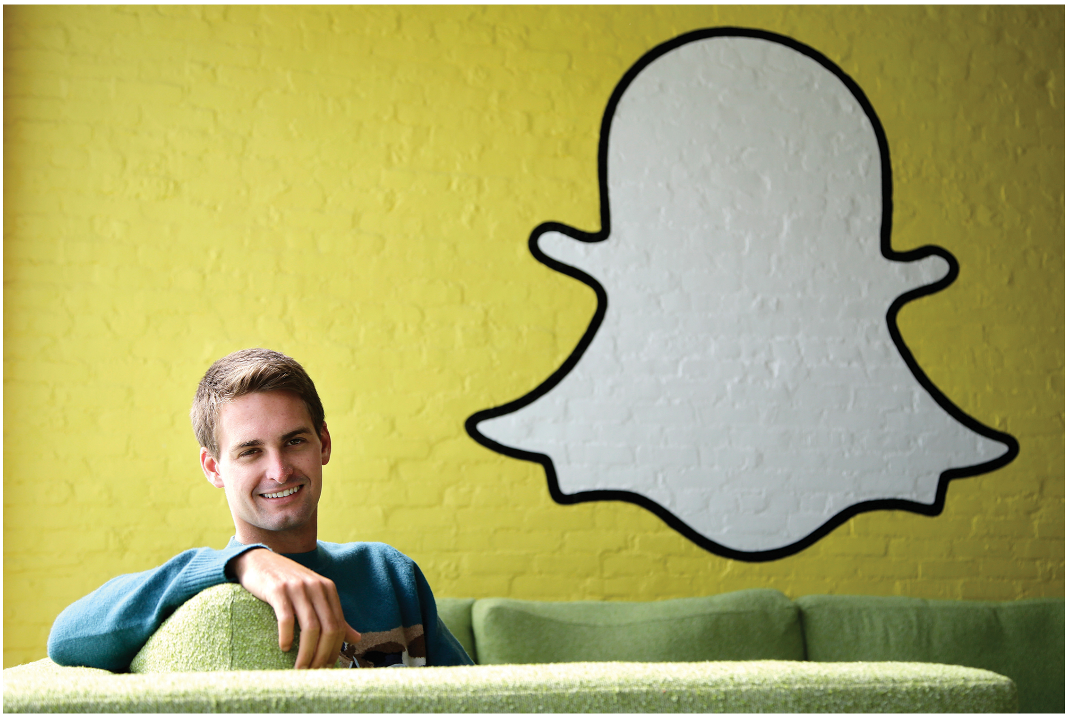
As we have already learned, a person's social-class position has a significant impact on their lifestyle. Most sociologists identify social classes in terms of wealth, income, and occupation, noting how social class influences consumption, education, health, and access to political power. The purpose of the following discussion is to describe broad class differences in the United States. Bear in mind that there are no sharply defined boundaries between the classes, and no real agreement among sociologists about where the boundaries should fall.

### The Upper Class

The upper class consists of the very wealthiest Americans—those households earning more than $207,400, approximately 20 percent of all American households (Schaeffer, 2020). Most Americans in the upper class are wealthy but not superrich. They are likely to own a large suburban home and perhaps a vacation home as well, drive expensive automobiles, vacation abroad, and educate their children in private schools and colleges. At the lower levels of this group, a large part of income may come from salaried earnings. This group includes many professionals, from some doctors and lawyers to university administrators and possibly even a few highly compensated professors.

At the very top of the upper class are the superrich—people who have accumulated vast fortunes that permit them to enjoy a lifestyle unimaginable to most Americans. If one uses a cutoff of the richest 0.1 percent in terms of income, these are people whose income tops $7.8 million, roughly 250,000 Americans (Blanchet et al., 2023). Their wealth stems in large part from their substantial investments, from stocks and bonds to real estate, and from the interest income derived from those investments. They include people who have acquired their wealth in a variety of ways: celebrities, professional athletes, the heads of major corporations, people who have made large amounts of money through investments or real estate, and those fortunate enough to have inherited great wealth from their parents.

A 2017 book by sociologist Rachel Sherman showed that the superrich and those below them in the top 1 percent are conscious of their unique and privileged social class position; some give generously to such worthy causes as the arts, hospitals, and charities. Their homes are often lavish and sometimes filled with collections of fine art. Yet, whereas previous generations of wealthy people in America were proud of their class identity as indicated by such things as being listed in the social register, today's wealthy tend to downplay their money—with some notable exceptions (Sherman, 2017).



Snap CEO Evan Spiegel poses for a photo in Los Angeles.

Frequently the wealthy have attended the same exclusive private secondary schools (to which they also send their children). They sit on the same corporate boards of directors and belong to the same private clubs. Sherman found that they contribute large sums of money to their favorite politicians and are likely to be on a first-name basis with members of Congress and perhaps even with the president. Yet their reasons for donating to charities and even political campaigns might be about more than having a significant influence on American politics (Domhoff, 2013). Many of the wealthiest are sensitive to the moral judgments that are made about their lifestyles. They thus expend a great deal of energy trying to confirm their moral worth in others' eyes. At times, this entails downplaying their wealth and minimizing their privilege, as well as making grand gestures to "give back" to society (Sherman, 2017).

The turn of the twenty-first century saw extraordinary opportunities for the accumulation of such wealth. Globalization is one reason. Entrepreneurs who can invest globally often prosper, by selling products to foreign consumers and making profits cheaply by using low-wage labor in developing countries. The information revolution is another reason for the accumulation of wealth. Young entrepreneurs with start-up, high-tech companies, such as Google cofounder Sergey Brin and Meta founder Mark Zuckerberg, made legendary fortunes. In 2022, Brin was the seventh-wealthiest person in the world, with an estimated net worth of $107 billion; Zuckerberg was fifteenth, with an estimated net worth of $67 billion. Twelve of the world's billionaires are under 30 (*Forbes*, 2023b).

As a consequence of globalization and the information revolution, the number of superrich Americans has exploded in recent years. At the end of World War II, only 13,000 people were worth $1 million or more in the United States. Today, the 400 richest Americans are worth $4.5 trillion; their combined fortunes increased 40 percent since the previous year (Dolan, 2023). Unlike the wealth of "old money" families such as the Rockefellers or the Vanderbilts, which was accumulated in earlier generations by the founders of a sort of American aristocracy, much of this "new wealth" is held primarily by entrepreneurs—including such recent arrivals as WhatsApp cofounder Jan Koum ($11.7 billion) and payment software company Bolt cofounder Ryan Breslow ($2.0 billion).

While Americans have long glamorized and aspired to be part of this extraordinarily wealthy elite, perceptions of the superrich have changed in recent years. The recession that began with the financial collapse of 2007–2008, combined with growing income inequality, triggered movements such as Occupy Wall Street, during which protesters sought to bring attention to what they saw as greed, corruption, and undeserved political power among the very wealthy. A recent Pew Research Center poll of U.S. adults found that 6 out of 10 believe that there is too much economic inequality, while 7 out of 10 claim the economic system unfairly favors powerful interests. Almost two-thirds would increase taxes on the wealthiest Americans to reduce inequality, although strong differences by political party exist on this issue. Such a redistribution of wealth is favored by 69 percent of respondents who are Democrats or lean Democratic, compared with only 36 percent of respondents who are Republicans or lean Republican (Horowitz et al., 2020a).

## The Middle Class

Middle class is a catchall term for a diverse group of people of various occupations and lifestyles who earn stable and sometimes substantial incomes at primarily white-collar and highly skilled blue-collar jobs. It generally describes households with income between $42,000 and $126,000 (dependent on the size of the household), a range that includes roughly 50 percent of all households (LaMagna, 2018; Snider, 2019). While the middle class was once largely White, today it is increasingly diverse—both racially and culturally—and includes African Americans, Asian Americans, and Latinos. The middle class grew throughout much of the first three-quarters of the twentieth century. According to one survey, it included 61 percent of all U.S. households in 1971 (*Pew Trust Magazine*, 2022), but has been shrinking for most of the past four decades.

For many years, when Americans were asked to identify their social class, the majority claimed to be middle class (Boushey & Hersh, 2012). The reason lay partly in the pervasive cultural belief that the United States is relatively free of class distinctions; few people want to be identified as being too rich or too poor. Most Americans seem to think that others are not very different from their immediate family, friends, or coworkers. Since people seldom interact with those outside their social class, they tend to see themselves as being like “most other people,”

whom they then regard as being “middle class” (Kelley & Evans, 1995). But changing economic conditions may have altered these perceptions. In a public opinion poll taken in 2015, 47 percent of Americans identified as middle class, down from 53 percent in 2008 (Pew Research Center, 2015b).

The American middle class can be further subdivided into two groups: the upper middle class and the lower middle class.

**The Upper Middle Class** The upper middle class consists of highly educated professionals (for example, doctors, lawyers, engineers, and professors), mid-level corporate managers, people who own or manage small businesses and retail shops, and some large farm owners. Household incomes range quite widely, from about $126,000 to perhaps $188,000 (Snider, 2019). The lower half of the income category would include college professors, for example, while the higher end would include corporate managers and small business owners. The upper middle class includes approximately 19 percent of all American households (Kochhar, 2018). Its members are likely to be college educated (as are their children), with advanced degrees. They own comfortable homes, drive expensive late-model cars, have some savings and investments, and are often active in local politics and civic organizations. However, they tend not to enjoy the same high-end luxuries, social connections, or extravagances as do members of the upper class. Historically, their jobs have been secure and provided retirement, pension, and health benefits, yet many upper-middle-class persons—especially those working in finance and media—have been susceptible to layoffs and have seen their pension and home-value wealth shrink (U.S. Department of Commerce, 2010).

**The Lower Middle Class** The lower middle class consists of trained office workers (for example, secretaries and bookkeepers), elementary and high school teachers, nurses, salespeople, police officers, firefighters, and others who provide skilled services. This group, which includes about 40 percent of American households, is the most varied of the social-class strata and may include college-educated persons with relatively modest earnings, such as public elementary school teachers, and quite highly paid persons with high school diplomas only, such as skilled craftspeople (e.g., plumbers) and civil servants with many years of seniority. Household incomes in this group range from about $31,000 to

$42,000 (Snider, 2019). As of 2016, 36 percent self-identify as lower middle class (Pew Research Center, 2016b).

Members of the lower middle class may own a modest house, although many live in rental units. Their automobiles may be late models, but not the more expensive ones. Almost all have a high school education, and some have college degrees. They want their children to attend college, although this goal usually requires work-study programs and student loans. They are rarely politically active beyond exercising their right to vote. Like upper-middle-class persons, lower-middle-class workers have seen their job security and financial security decline as a result of economic changes over the past several decades. The global recession of 2007–2009, and the lockdowns and subsequent economic downturn in 2020 caused by Covid-19, saw unemployment rates jump from under 5 percent to a high of nearly 15 percent in April 2020 (U.S. Bureau of Labor Statistics, 2023c). Such downturns disproportionately affect lower middle-class workers. During the Covid lockdown, for example, many professionals were able to continue working remotely from home, an option not available to many in the lower middle class. In this case, however, the downturn was blunted by the American Rescue Plan—$5 trillion in government spending to stimulate the economy during the pandemic, including $1.8 trillion to households and $1.7 trillion to businesses. Federal intervention enabled the economy to avoid a major recession, affording some protection to the most vulnerable workers. By late 2020, the rate of unemployment had been cut in half (to 6.7 percent); by early 2023, it was at historic lows (3.4 percent) (Parlapiano et al., 2022; U.S. Bureau of Labor Statistics, 2023c).

## The Working Class

The working class includes primarily blue-collar workers such as mechanics and pink-collar laborers such as clerical aides. Household incomes range from about $20,000 to $40,000 (Elwell, 2014), and at least two household members must work to make ends meet. Family income is just enough to pay the rent or the mortgage, put food on the table, and perhaps save for a summer vacation. The working class includes factory workers, mechanics, office workers, salesclerks, restaurant and hotel workers, and others who earn a modest weekly paycheck at a job that involves little control over the size of their income or working conditions. According to a Gallup poll from 2017, about 30 percent of Americans

self-identify as working class (Bird & Newport, 2017). As you will see later in this chapter, many manufacturing jobs in the United States are threatened by economic globalization and technological change, so members of the working class today are likely to feel insecure about their own and their family's future.

The working class is racially and ethnically diverse. While older members of the working class may own a home bought several years ago, younger members are likely to rent. The home or apartment is likely to be in a lower-income suburb or a city neighborhood. The household car, a lower-priced model, is unlikely to be new. Most members of the working class are not likely to be politically active even in their own community, although they may vote in some elections.

Children of working-class families often bypass college and instead seek full-time work immediately after graduating from high school. However, high school graduates' employment and earnings prospects are bleak. Most recently, the unemployment rate for people 25 and older with only a high school diploma was 3.9 percent, median weekly earnings were only $853; for high school dropouts, the situation was even worse, with 5.7 percent unemployed and median weekly earnings of $682 (U.S. Bureau of Labor Statistics, 2023o, 2023q). Rutgers University researchers studied high school graduates from the classes of 2009 to 2011 who did not go on to college; as of 2011, only 16 percent were working full-time, 37 percent were unemployed and looking for work, 17 percent were unemployed and had given up on finding work, and 13 percent were hoping to up their current work hours from part-time to full-time (Van Horn et al., 2012). Of those who had found jobs, the median hourly wage was $7.50, just $0.25 above the federal minimum wage. These bleak employment prospects bode poorly for their futures; two-thirds of the high school graduates viewed important life transitions such as starting a family or owning a home as many years off in the future.

## The Lower Class

The lower class, which overlaps with the working class to account for about 29 percent of American households, includes some full-time, low-wage workers and those who work part-time or not at all; their annual household income is typically lower than $31,000 (Kochhar, 2018; Snider, 2019). Most lower-class individuals live in cities, although some

live in rural areas and earn a little money as farmers or part-time workers. Some manage to find employment in semiskilled or unskilled manufacturing or service jobs, ranging from making clothing in sweatshops to cleaning houses. Their jobs, when they can find them, are unlikely to lead to promotion or substantially higher income. Their work is probably part-time and highly unstable, without benefits such as medical insurance, disability, or Social Security. Even if they are fortunate enough to find a full-time job, there are no guarantees that it will be around next month or even next week.

Many people in the lower class live in poverty. Very few own their own homes. Most of the lower class rent, and some are homeless. If they own a car at all, it is likely to be a used car. Compared to other social classes, a higher percentage of the lower class is non-White (Lin & Harris, 2010). Members of the lower class do not participate in politics, and they seldom vote.

# Social Mobility: Moving Up and Down the Ladder

The United States has long been hailed as the land of opportunity. "Rags-to-riches" stories abound, offering inspiring accounts of people such as Oprah Winfrey, who was born into poverty in rural Mississippi and was raised first by her teenage mother, then by her grandmother while her mother sought low-wage work in Milwaukee. Oprah went on to become the country's most celebrated talk show host, an actress, an author, a TV producer and a philanthropist. Her estimated net worth today is $2.5 billion (Hyatt, 2022).

Is it really possible for a young person from a poor or working-class background to transcend class roots and become an upper-class professional? If yes, what factors contribute to their ascent up the social ladder? Answers to these questions can be found in the study of social mobility, which refers to the upward or downward movement of individuals and groups between different class positions through changes in occupation, wealth, or income. Mobility can occur in one of two forms. Intergenerational mobility refers to social movement across generations; we can analyze where children are on the scale compared with their parents or grandparents. Intragenerational mobility, by

contrast, refers to how far an individual moves up or down the socioeconomic scale during their working life. Another important distinction is between structural mobility and exchange mobility. Most mobility, whether intragenerational or intergenerational, is structural mobility—upward mobility made possible by an expansion of better-paid occupations at the expense of poorly paid ones. Most mobility in the United States since World War II has depended on continually increasing prosperity. In a hypothetical society with complete equality of opportunity—in which each person has the same chance of success as everyone else—there would be a great deal of downward as well as upward mobility. This is exchange mobility—an exchange of positions such that more talented people in each generation move up the economic hierarchy, while the less talented move down. In practice, however, no society approaches full equality of opportunity.

Intergenerational social mobility is often measured by income: How likely is it that when children reach adulthood, they will wind up earning more than their parents? One recent study of children born between 1940 and 1984 found that while nearly all children who were born in 1940 did in fact earn more than their parents, this was no longer true for later generations, regardless of their gender, or the state in which the children were born. For example, among children born in 1940 to parents who were earning an average income, 93 percent earned more than their parents; among those born in 1980, this dropped to less than half (45 percent). Among those whose parents' income was in the lowest 10 percent of all incomes, children earning more than their parents declined from 88 percent among those born in 1950 to only 22 percent among those born in 1980. The study concluded that the largest declines have been for middle-class families and that these trends were largely due to growing U.S. inequality. As we have seen, in recent years economic growth has been highly uneven, with the benefits going largely to the upper class (and indeed the wealthiest individuals), while the American middle class has shrunk. While economic growth may sometimes result in structural mobility, this is only likely to be the case if all segments of society benefit from such growth (Chetty et al., 2017, 2019).

Higher education provides a path to upward mobility in the United States, but getting into college is often contingent upon one’s social background.

Not surprisingly, perhaps, there are significant differences in intergenerational upward mobility for different racial and ethnic groups. Based on household income, 26 percent of Asian Americans born into the bottom fifth of the U.S. income distribution make it into the top fifth. The comparable figure for Whites is 11 percent; for Hispanics, 7 percent; for Native Americans and Blacks, 3 percent (Chetty et al., 2019). Downward intergenerational mobility is less common than upward mobility, although there are still racial and ethnic significant differences. Asian American children born into the top fifth of the income distribution have a 50 percent chance of staying there as adults; the comparable figure for Whites is 41 percent; for Hispanics, 31 percent; for Native Americans, 23 percent; and for Blacks, 18 percent (Chetty et al., 2017, 2019).

The most common type of downward mobility is intragenerational (short-range) rather than intergenerational, such as when a worker moves from one job to another that is similar in pay and prestige (for example, from a routine office job to semiskilled blue-collar work). Although such moves may seem fairly minor, they are often accompanied by quite serious psychological costs and may create family strains. Men and women who stake their identity on having a well-paying and rewarding job may find

themselves despondent working in a job that provides neither rich earnings nor the prestige and satisfaction that accompanied their prior job (Warner, 2010).

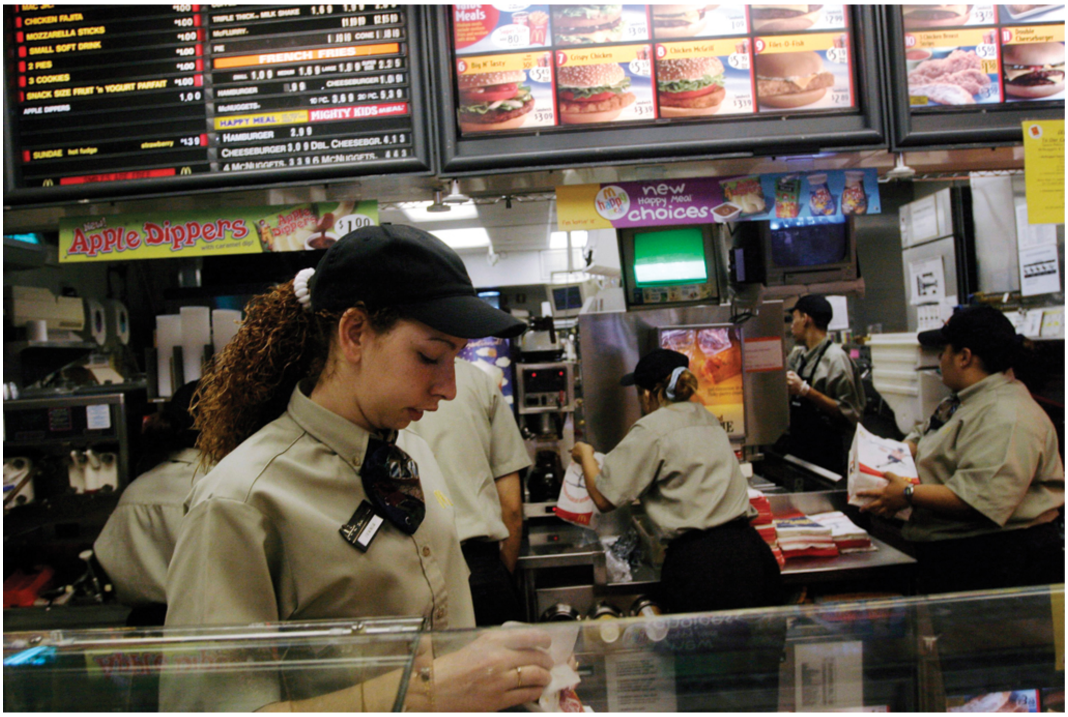
Men line up for a New York job fair. The 2007–2009 recession was termed a "mancession" because the economic downturn affected predominantly male professions like finance.

For women, both inter- and intragenerational downward mobility may have an additional source: divorce. One study found that women who divorced were between 31 and 36 percentage points more likely than their married counterparts to fall down the economic ladder (Acs, 2011). Studies also show that the fortunes of adult women change dramatically upon divorce. Newman (1999) tracked the experiences of upper-middle-class suburban mothers who found themselves struggling to maintain their former lifestyles after divorce. As we will learn more about in Chapter 15, women's standard of living drops by as much as a third after divorce.

## The Importance of Education

Education can play a major role in one's social and cultural capital; it clearly plays a major part in determining upward mobility. In a classic

study of intergenerational mobility in the United States, sociologists Peter Blau and Otis Dudley Duncan (1967) concluded that the key factor behind such mobility was educational attainment. A child’s education is influenced by family social status; this, in turn, affects the child’s social position later in life. Sociologists William Sewell and Robert Hauser (1980) later confirmed Blau and Duncan’s conclusions. They added to the argument by claiming that the connection between family background and educational attainment occurs because parents, teachers, and friends influence the child’s educational and career aspirations, and that these aspirations then become an important influence on the schooling and careers obtained throughout the child’s life. One of the most important avenues to upward intergenerational mobility is therefore higher education. One study (Haskins, 2009) found that at all income levels, a college education paid off. Children who earned a college degree were significantly more likely to earn more than their parents than were children who did not graduate from college. Moreover, the differences were largest for middle-class children, suggesting that the returns on education were greater for this group than for the very poor or the very wealthy.




In 2017, more than 7.2 million Americans were among the working poor. Women are more likely than men to be among the working poor.

Of course, parents' income itself has a strong effect on whether their children even go to college. In 2016, 78 percent of young adults from the top 20 percent of American households were enrolled in postsecondary education, compared to just 28 percent of those in the bottom 20 percent (NCES, 2019a). Fully 60 percent of children from families in the top fifth of income earners graduated from college, whereas in the bottom fifth of earners, just 15 percent attained college degrees (Cahalan et al., 2016). One reason that family income plays a role in whether or not one goes to college is that children born into lower-income families are more likely to drop out of high school, and if they complete high school, they do so without the preparation and grades that would qualify them for college (Cameron & Heckman, 2001; NCES, 2016). And when lower-income children go to college, they are less likely to be able to afford the better schools, where students have better earnings outcomes as adults. Schools, like neighborhoods, tend to be segregated by income level. One study found that 37 percent of higher-income students (those in the top 20 percent income bracket) are enrolled at highly selective universities as compared to 7 percent enrollment of students from the lowest 20 percent (NCES, 2019a). Enabling lower-income students to attend more elite colleges, whose students come from higher-income backgrounds, would increase low-income students' intergenerational mobility (Chetty et al., 2020).

# Poverty in the United States

In much of this chapter, we have been concerned with inequality between social classes, yet the fact that there is a gap between those at the top or middle and those at the bottom does not necessarily mean that people at the bottom are very poor. One could imagine a society in which people at the top of the wealth distribution pay taxes that are high enough to ensure that those at the bottom have adequate resources. Or one could imagine a society in which people at the bottom feel less life satisfaction because they don't have as much as those above them, while at the same time having adequate resources for education and many of the most important health outcomes.

Therefore, in defining poverty, a distinction is usually made between absolute and relative poverty. Absolute poverty means that a person or family simply can't get enough to eat, or perhaps does not have access to

adequate health care and education. People living in absolute poverty usually do not have access to healthy food or, in situations of famine, may even starve to death. Absolute poverty is common in the poorer developing countries. In many industrial countries, by contrast, relative poverty is essentially a measure of inequality. It means being poor as compared with the standards of living of the majority.

At the bottom of the class system in the United States are millions of people who live in poverty. Many cannot maintain a proper diet and may live in neighborhoods marked by high crime rates, exposure to dangerous environmental conditions, and run-down, dilapidated homes. Poor persons are more likely than their richer counterparts to suffer from every possible health condition, ranging from heart disease to diabetes, and consequently their average life expectancy is lower than that of the majority of the population. Thus, they experience absolute poverty. But unlike in many countries in the developing world, where poor people do not see much affluence around them, in the United States the poor are aware of the prosperity around them. Therefore, they must live with both absolute and relative poverty.

## How Many People Live in Poverty?

The U.S. government currently calculates a poverty line based on cost estimates for families of different sizes. Historically, this calculation has reflected a strict, no-frills budget, which for a family of four in 2020 (two adults, two children) worked out to an annual income of less than $26,246, or a little less than $2,200 a month to cover all expenses (CRS, 2022). This official measure was developed some 60 years ago, when research found that multiplying the cost of a minimum food diet by three would enable a household to adequately cover all other expenses, thereby avoiding poverty.

How realistic is this assumption? Over the past six decades the cost of housing has increased three times faster than the cost of food, leading critics to argue that because of the housing costs that the poor must pay, the official measure significantly underestimates the number in poverty. According to some research, three-fourths of all U.S. families whose income is $15,000 a year (about what would be earned under the federal minimum wage) are spending more than half their income on housing (Joint Center for Housing Studies of Harvard University, 2020). Critics

also point out that basing a poverty measure exclusively on estimated food costs ignores other expenses the poor may incur—such as costs related to variations in housing costs in different states; payroll deductions for Social Security or federal and state income taxes; work-related expenses; medical expenses; and child support. On the other hand, the official measure may also overestimate the number in poverty, since it fails to consider various forms of government support available to the poor, such as Medicare and Medicaid (government health care financial assistance for the elderly and the poor), public housing subsidies, tax credits, and—during Covid-19—stimulus payments sent to households (U.S. Bureau of the Census, 2022g). It also cannot take into account any unreported "under-the-table" pay obtained from work at odd jobs.

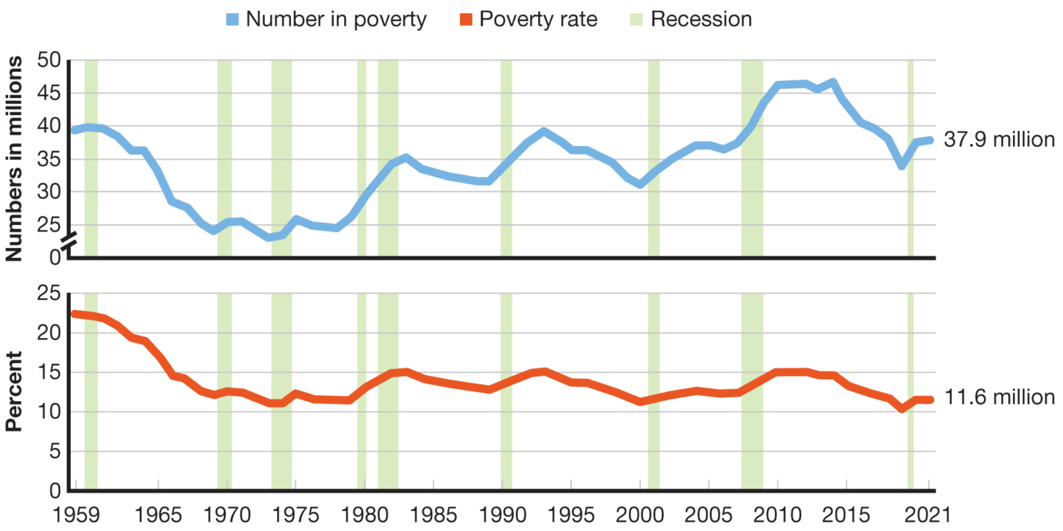
To address these issues, the U.S. Census Bureau has developed a Supplemental Poverty Measure (SPM) that takes these issues into account. Although the SPM yields more accurate poverty measures that are sensitive to local conditions, it is intended to be used only as a research tool; it does not replace the official measure, which remains the determinant of eligibility for governmental antipoverty support. The U.S. Census Bureau started publishing the SPM in 2009, and for a decade it consistently found the actual rate of poverty to be 1 to 2 percent higher than the official measure. The SPM also results in significantly different poverty thresholds depending on whether one rents a home, whether one owns a home with or without a mortgage, and where one lives. For example, recall that the official 2020 poverty level was $26,246 for a two-adult, two-child household. Based on the SPM, the poverty level would be slightly lower for homeowners without mortgages ($25,222) but higher for homeowners with mortgage payments ($29,959) and highest for renters ($30,150). The official poverty rate also masks major variations in poverty from state to state. The largest concentrations of poverty in the United States are found in the South, inner cities, and rural areas. For example, the poverty level for a two-adult, two-child renter household in small South Carolina metropolitan areas drops to $23,872, thereby lowering the number of poor in that region. At the other extreme, it jumps to $46,538 in California's Silicon Valley, where skyrocketing housing prices have hurt homeowners and renters alike (CRS, 2022).

We noted that for a decade the SPM showed higher poverty levels than the official measure. This was reversed in 2020, and by 2021 the official poverty measure indicated 37.9 million Americans living in poverty (11.6

percent of the population), while the SPM indicated far fewer numbers—25.5 million Americans (7.8 percent). Why such a sizeable shift? It turns out that the government's Covid-19 stimulus payments made a significant (if temporary) difference in lifting people out of poverty (Creamer et al., 2022a). By the same token, President Lyndon Johnson's War on Poverty had the same effect during the 1960s, helping to halve the official poverty rate (it was 22 percent in 1960, 11 percent a decade later). Since that time, the official poverty rate has fluctuated between 11 and 15 percent, rising during economic downturns and falling during periods of economic growth (Creamer et al., 2022b) (**Figure 8.3**). Among the poor, in 2021, 18.2 million Americans (or 5.5 percent of the country) lived in extreme poverty: Their incomes were only half of the official poverty level, meaning that they live at near-starvation levels (Creamer et al., 2022b).

Figure 8.3

**NUMBER IN POVERTY AND POVERTY RATE USING THE OFFICIAL POVERTY MEASURE, 1959–2021**




Source: Creamer et al., 2022b.

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## The Working Poor

Many Americans fall into the category of the working poor—that is, people who work at least 27 weeks a year but whose earnings are not high enough to lift them above the poverty line. In 2021, there were 7.2

million individuals aged 18 to 64 (4.7 percent of all workers) among the working poor. Education can make a significant difference in this regard: Three-quarters of the working poor are high school dropouts (Creamer et al., 2022b). The working poor are disproportionately non-White and immigrant; Hispanics and Blacks are twice as likely as Whites and Asian Americans to fall into this category. Not surprisingly, part-time workers are more likely to fall into poverty (10.2 percent) than full-time workers (2.6 percent). About half of the working poor are in service occupations (U.S. Bureau of Labor Statistics, 2022k). Many of the working poor must rely on federal assistance to make ends meet. One study of two federal programs—Medicaid and the federal Supplemental Nutrition Assistance Program (SNAP), or food stamps—found that half the recipients had full-time, year-round jobs (U.S. Government Accountability Office, 2020).

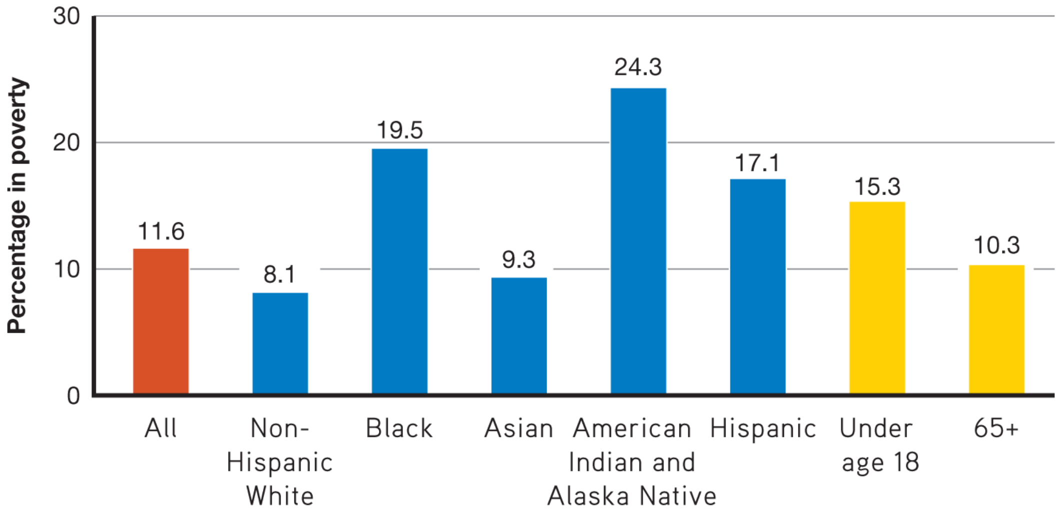
## Poverty, Race, and Ethnicity

Poverty rates in the United States are much higher among most minority groups than among non-Hispanic Whites, even though more than 42 percent of the poor are White (Creamer et al., 2022c). As Figure 8.4 shows, Blacks and Hispanics experience more than double the poverty rate of Whites. Median household income among Hispanics was 75 percent of Whites' in 2018; among Blacks, it was only 61 percent of Whites' (U.S. Bureau of the Census, 2019b). This discrepancy occurs because Black and Hispanic individuals often work at the lowest-paying jobs and because of racial discrimination. Asian Americans have the highest income of any group, but their poverty rate is also slightly more than that of Whites, reflecting the influx of relatively poor Asian immigrant groups.

The number of Blacks living in poverty has declined considerably in recent years. In 1959, 55 percent of Blacks were living in poverty; by 2021, that figure had dropped to 19.5 percent. A similar pattern holds for Hispanics: Poverty grew steadily between 1972 and 1994, peaking at 31 percent of the Hispanic population. By 2021, however, the poverty rate for Hispanics had fallen to 17.1 percent. The highest rates are among Native Americans, of whom nearly one in four (24.3 percent) live in poverty (Creamer et al., 2022c).

Figure 8.4

AMERICANS LIVING IN POVERTY, 2021

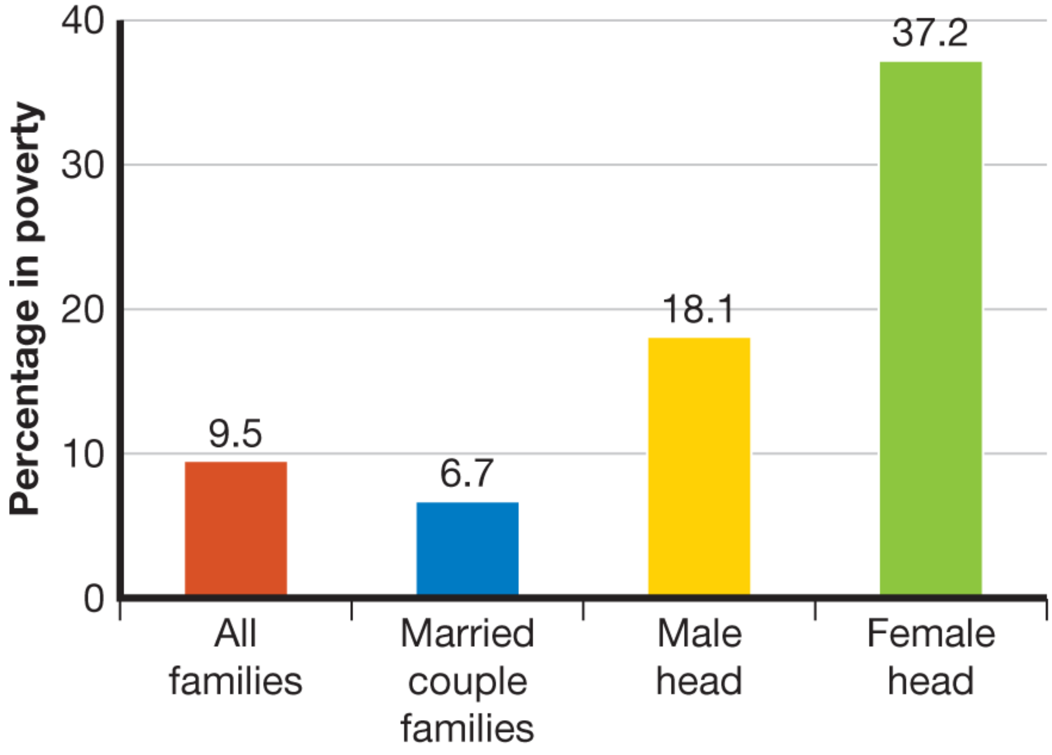



Source: Creamer et al., 2022c.

## The Feminization of Poverty

Figure 8.5

FAMILIES WITH CHILDREN UNDER 18 IN POVERTY, 2021



Source: Creamer et al., 2022d.

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Much of the growth in poverty is associated with the feminization of poverty, an increase in the proportion of the poor who are women. Growing rates of divorce, separation, and single-parent families have placed women at a particular disadvantage, since it is extremely difficult for unskilled or semiskilled, low-income, poorly educated women to raise children by themselves while also holding down a job that could raise them out of poverty. As a result, in 2021 nearly one in four female-headed households (23.0 percent) were poor, while 37.2 percent of all single-parent families with children under 18 headed by women were poor (by way of comparison, less than 6.7 percent of married couples with children were poor; see Figure 8.5). The feminization of poverty is particularly acute among families headed by racial minorities. The rate of poverty for female-headed households is highest among Native Americans (43.5 percent), followed by Blacks (30.8 percent) and Hispanics (30.3 percent). Almost a third of female-headed Hispanic families with children live in poverty. These rates are considerably higher than the poverty rates for either White (18.6 percent) or Asian American (15.1 percent) female-headed households (Creamer et al., 2022d).

A single woman attempting to raise children alone is caught in a vicious circle (Edin & Kefalas, 2005). If she has a job, she must find someone to take care of her children since she cannot afford to hire a babysitter or pay for day care. From her standpoint, she will take in more money if she accepts welfare payments from the government and tries to find illegal part-time jobs that pay cash not reported to the government rather than a regular full-time job paying minimum wage. Even though welfare will not get her out of poverty, if she finds a regular job, she will lose her welfare altogether, and she and her family may be even worse off economically.

## Children in Poverty

Given the high rates of poverty among families headed by single women, it follows that children are the principal victims of poverty in the United States. In 2021, nearly one out of every six children under 18 (15.3 percent) lived in a household with income levels beneath the poverty line. A recent UNICEF study reported that among the 35 wealthiest nations in

the world, the United States has the seventh-highest child poverty rate, falling behind countries such as Spain, Mexico, and Romania (World Economic Forum, 2017). Nonetheless, that rate has varied considerably over the last six decades, declining when the economy expands or the government increases spending on antipoverty programs and rising when the economy slows and government antipoverty spending falls. The child poverty rate in the United States declined from 27 percent of all children in 1959 to 14 percent in 1973, a period associated with both economic growth and the War on Poverty (1963–1969). During the 1980s and until the mid-1990s, as economic growth slowed and cutbacks were made in government antipoverty programs, child poverty grew, exceeding 20 percent during much of the period. The economic expansion of the late 1990s saw a drop in child poverty rates, and by 2000 the rate had fallen to 16 percent, a 20-year low. The recession of 2007–2009 saw an increase in the rate of child poverty, reaching a high of 21 percent in 2014; economic recovery subsequently saw the rate drop to a historic low of 14 percent in 2019. While one might have expected the 2020–2021 Covid-19 recession to result in another large increase in child poverty this was averted by the previously mentioned governmental stimulus payments. Child poverty, like all poverty indicators, varies considerably by race. In 2021, the child poverty rate for Whites and Asian Americans was 8.8 percent. For Blacks it was 27.3 percent; for Hispanics, 22.4 percent; and for Native Americans, 29.6 percent (U.S. Bureau of the Census, 2022e).

## The 65+ Population in Poverty

Relatively few persons ages 65 and older live in poverty (10.3 percent), thanks to two key governmental support programs for the elderly: Social Security and Medicare. Again, however, this aggregate statistic conceals vast racial and ethnic differences in the economic well-being of older adults. In 2021, older adult poverty rates were 8.0 percent among Whites, 13.3 percent among Asian Americans, 17.8 percent among Blacks, 18.7 percent among Hispanics, and 19.7 percent among Native Americans (U.S. Bureau of the Census, 2022e). These figures may actually underestimate how widespread older adult poverty is because poverty rates fail to consider the high (and rising) costs of medical care, which disproportionately strike older adults. Adults 65 and older benefit from Medicare, yet more than a third report being concerned that they will be unable to meet their health care expenses in the coming year—a figure

that rises to nearly half of all adults 55 to 64, who are not yet eligible for Medicare (Willcoxon, 2022).

Because older people have, for the most part, retired from paid work, their income is based primarily on Social Security and private retirement programs. As previously noted, Social Security and Medicare have been especially important in lifting many older adults out of poverty. Yet people who depend solely on these two programs for income and health care coverage are likely to live modestly at best. In 2021, some 47 million retired workers were receiving Social Security benefits; 3 million of their spouses and dependent children also benefited. Yet the average monthly benefit was just $1,658, providing nearly three-fifths of their total income (most of the remainder came from investments, private pension funds, and sometimes earnings) (Social Security Administration, 2022). Low-income households in particular are likely to rely heavily on Social Security: The lowest income group of adults 65 and older—the 20 percent with income under $13,500 annually—obtain an average of 81 percent of their income from Social Security benefits, compared to 15 percent for the highest income group. Yet even the combination of Social Security and private pensions results in modest retirement incomes for most people: In 2018, the median income for those 65 and older was $23,696 (Semega et al., 2019).

## A Special Case of Poverty: Homelessness

Homeless persons are traditionally seen as being at the bottom of the social hierarchy. The growing problem of homelessness is one of the most distressing signs of changes in the American stratification system. Homeless people are a common sight in nearly every U.S. city and town and are increasingly found in rural areas as well. Two generations ago, homeless populations were mainly elderly, alcoholic men who were found on the skid rows of the largest metropolitan areas. Today, they are primarily young single men, often of working age. In large urban areas many live in homeless encampments, so-called tent cities located under bridges, highway underpasses, or on vacant land.

More than half a million people, 60 percent of whom are men, are homeless on any given night in the United States.

Because it is extremely difficult to count people who do not have a stable residence, estimates of the number of homeless people vary widely. The most recent official government estimate is that on any given night in 2022 nearly 600,000 people were homeless in the United States; three out of five were in shelters, the rest on the streets. Nearly a third (30 percent) are chronically homeless, a number that has been steadily increasing in recent years. Families with children account for 28 percent of those currently homeless, a number that is currently declining. An estimated 50 percent of the homeless are White, 37.3 percent are Black, 24.1 percent are Hispanic, and 3.4 percent are Native American (U.S. Department of Housing and Urban Development, 2022).

Sadly, veterans—the men and women who have served their country in the armed forces—have particularly high rates of homelessness, due in part to work-limiting physical and mental health problems triggered by combat. More than 33,000 veterans were homeless on any given night in January 2021, accounting for 7 percent of homeless adults; veteran homelessness, like other forms of poverty, varies by race. Many homeless veterans suffer from at least one chronic—and costly to treat—health condition (Haggerty, 2012). The good news is that veteran homelessness has reportedly declined by half since 2009.

There are many reasons why people become homeless. About two-thirds reported having a problem with alcohol at some point during their lives, another two-thirds reported having a problem with drugs at some point, and nearly 60 percent have experienced a mental health problem. Additionally, insufficient income and lack of affordable housing are a lead cause (National Law Center on Homelessness and Poverty, 2004, 2015). One reason for the widespread incidence of such problems among homeless people is that many public mental hospitals have closed their doors. The number of beds in state mental hospitals has declined by as many as half a million since the early 1960s, leaving many mentally ill people with no institutional alternative to a life on the streets or in homeless shelters. Such problems are compounded by the fact that many homeless people lack family, relatives, or other social networks to provide support.

The rising cost of housing is another factor, particularly in light of the increased poverty noted elsewhere in this chapter (Colburn & Aldern, 2022). Declining incomes at the bottom, along with rising rents, create an affordability gap between the cost of housing and what poor people can pay in rent. The share of renters paying more than 30 percent of income for rent has more than doubled since the 1960s, from 23 percent to 48 percent (Joint Center for Housing Studies of Harvard University, 2020). The burden of paying rent is extremely difficult for low-income families whose heads of household work for minimum wage or slightly higher. Paying so much in rent leaves them barely a paycheck away from a missed rental payment and eventual eviction.

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**CONCEPT CHECKS**

1. **What are the major social class groups in the United States today? Describe at least two ways (other than income) that these groups differ from one another.**
2. **Contrast intragenerational and intergenerational mobility.**
3. **According to classic studies of mobility in the United States, how does family background affect one's social class in adulthood?**
4. **Describe the demographic characteristics of the poor in the United States.**
5. **Why are women and children at a high risk of becoming impoverished?**

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# Glossary

upper class
: A social class broadly composed of the more affluent members of society, especially those who have inherited wealth, own businesses, or hold large numbers of stocks (shares).

middle class
: A social class composed broadly of those working in white-collar and lower managerial occupations.

working class
: A social class broadly composed of people working in blue-collar, or manual, occupations.

lower class
: A social class comprising those who work part-time or not at all and whose household income is typically lower than $31,000 a year.

social mobility
: Movement of individuals or groups between different social positions.

intergenerational mobility
: Movement up or down a social stratification hierarchy from one generation to another.

intragenerational mobility
: Movement up or down a social stratification hierarchy within the course of a personal career.

structural mobility
: Mobility resulting from changes in the number and kinds of jobs available in a society.

exchange mobility
: The exchange of positions on the socioeconomic scale such that talented people move up the economic hierarchy while the less talented move down.

absolute poverty
: A state of poverty in which one lacks the minimal requirements necessary to sustain a healthy existence.

relative poverty
: Poverty defined according to the living standards of the majority in any given society.

poverty line

An official government measure to define those living in poverty in the United States.

working poor

People who work but whose earnings are not enough to lift them above the poverty line.

feminization of poverty

An increase in the proportion of the poor who are female.

homeless

People who have no place to sleep and either stay in free shelters or sleep in public places not meant for habitation.

# 4 UNANSWERED QUESTIONS

**Learn about competing explanations for why poverty exists and the means for combating it. Understand your own chances for social mobility. Learn how changes in the U.S. economy since the 1970s have led to growing inequalities.**

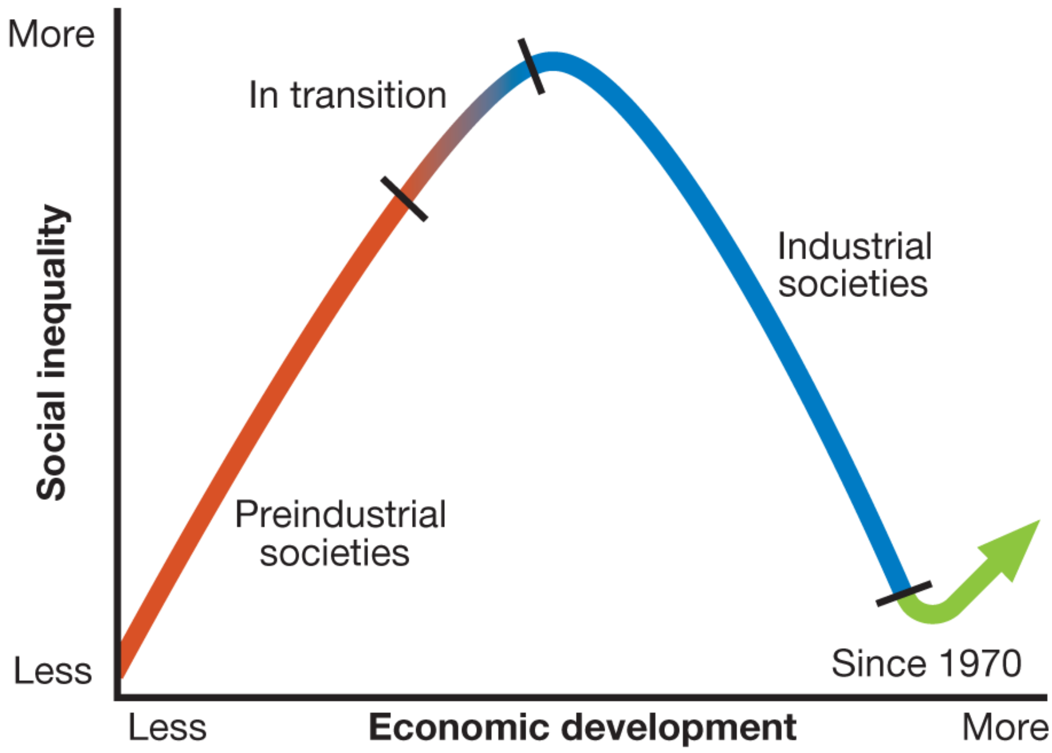
Sociologists have been documenting important trends in inequality. Here we look at four of the policy-relevant questions that have emerged from this continually evolving research, and provide some preliminary answers: Is inequality declining or increasing in the United States? Why are poverty rates rising in the United States? What can be done to combat poverty? How will these economic patterns affect your life?

## Is Inequality Declining or Increasing in the United States?

In 1955, the Nobel Prize–winning economist Simon Kuznets proposed a hypothesis that came to be widely accepted: the Kuznets curve, a formula showing that inequality increases during the early stages of capitalist development, then declines, and eventually stabilizes at a relatively low level (**Figure 8.6**). Studies of European countries, the United States, and Canada all suggested that inequality peaked in these places before World War II, declined through the 1950s, and remained roughly the same through the 1970s (Berger, 1986; Nielsen, 1994). In the post–World War II era, inequality declined due in part to economic expansion in industrial societies, which created opportunities for people at the bottom to move up, and in part to government health insurance, welfare, and other programs aimed at reducing inequality.

Figure 8.6

**THE KUZNETS CURVE**




*The Kuznets curve, named for the Nobel Prize–winning economist who first advanced the idea in 1955, argues that inequality increases during early industrialization, then decreases during later industrialization, eventually stabilizing at low levels. Some evidence suggests that inequality may increase once again during the transition to postindustrial society.*

Source: Nielsen, 1994.

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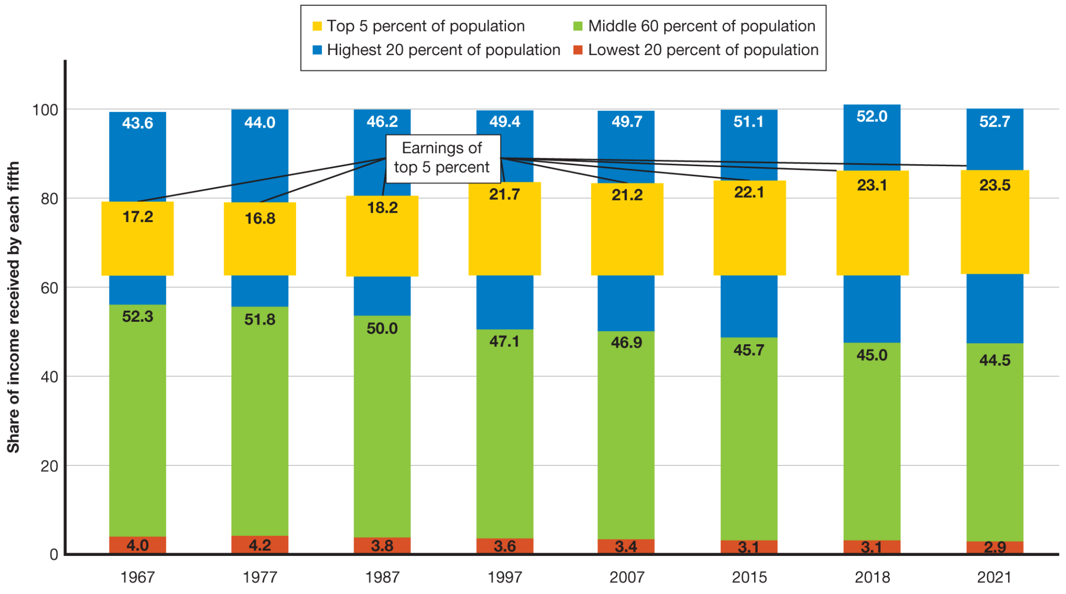
Was Kuznets's prediction correct? Have we seen stabilization in levels of inequality? There is evidence that some capitalist economies have entered a fourth phase, one in which inequality is again increasing. In the United States, for example, during the past 30 years, the rich have gotten much richer, middle-class incomes have stagnated, and the poor have grown in number. The gap between rich and poor is the largest since 1947, when the Census Bureau started measuring it, and the largest in the industrial world. Among industrialized countries, the United States has the most unequal distributions of household income (Iceland, Norway, and Finland have the most equal distribution). In 2015, the top 1 percent of households in the United States received 40 times the income of the bottom 90 percent (see also Figure 8.7) (World Population Review, 2023a).

Most people are aware that the gap between rich Americans and all others has increased significantly. The reasons for this increase are many and debated, but globalization (whose role we consider in the next chapter) and the declining role of governments (discussed in Chapter 13) are likely two factors that have led to rising inequality not only in the United States and Europe but also in much of the world.

Another indication of growing inequality is the growing earnings gap between top corporate officials and average working Americans. In 2020, the CEOs of the 350 largest publicly owned U.S. firms earned, on average, $24.2 million, when their total compensation (salaries and stock options) are taken into account. This works out to 351 times the average worker compensation in these industries of $68,400. Fifty years ago, CEOs earned only 21 times as much as the average workers (Mishel & Kandra, 2021).

Figure 8.7

**DISTRIBUTION OF INCOME IN THE UNITED STATES, 1967–2021**




Source: U.S. Bureau of the Census, 2022c.

The Occupy Wall Street movement drew attention to rising income inequality in the United States.

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The ideas behind the Kuznets curve may have held true for much of the nineteenth and twentieth centuries, but whether it will hold true for the twenty-first century remains an open question.

## Thomas Piketty: "Capital in the Twenty-First Century"

The most influential book on social stratification to appear in many years was written not by an American sociologist but by a French economist. Published in 2013, Thomas Piketty's book *Capital in the Twenty-First Century* (the title is intended to suggest an updating of Karl Marx's book by the same title, written nearly 150 years ago) examines changes in the sources and concentration of wealth in capitalist economies since the Industrial Revolution some two and a half centuries ago.

Although his book is long (700 pages), dense, and full of dozens of complicated tables and graphs, Piketty's conclusions can be stated simply: Unless an economy is growing rapidly—for example, because of technological breakthroughs or rapid population growth—increases in wealth will exceed economic growth. This situation, he shows, will

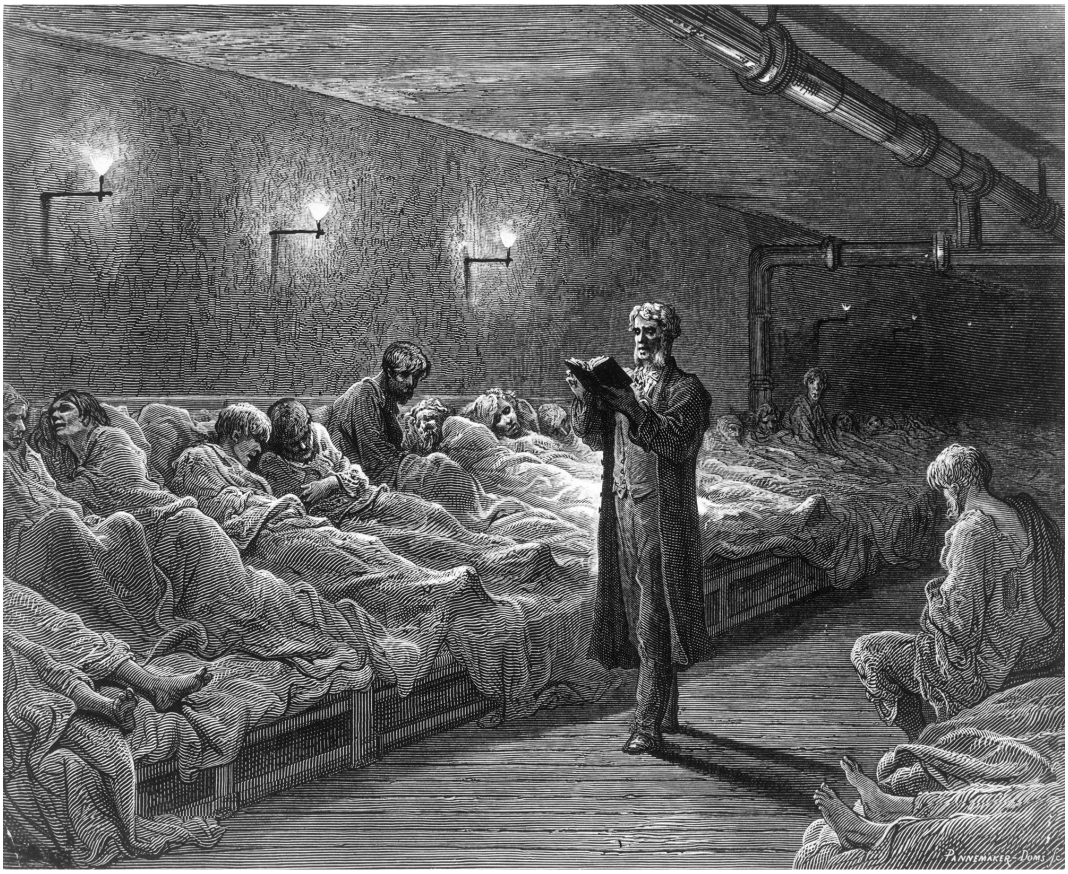
inevitably result in a concentration of wealth—especially inherited wealth—and therefore growing inequality. Ever-increasing wealth inequality is therefore not an accident but rather an inevitable feature of almost all capitalist economic systems.

Piketty shows that this has been the case in most developed economies, with one major exception: the mid-twentieth century. During the period that included two world wars and the Great Depression, government policies (such as Roosevelt's New Deal), followed by periods of rapid economic growth, briefly reduced wealth inequality. But he argues that this reduction was an exception, and, in fact, we have once again entered a period of growing inequality. In the United States, for example, he shows that 60 percent of the increase in income in the past 30 years has gone to the richest 1 percent—a situation he calls "patrimonial capitalism" (*patrimonial* refers to a system in which power is concentrated in the hands of a few). This situation is of concern, he argues, because it is both politically untenable and economically unstable. To avoid a future crisis, he calls for a global tax on wealth.

Piketty's argument has been well received by sociologists since it provides an explanation for growing inequality that is supported by data and has the broad historical sweep of Marx and Weber.

# Why Are Poverty Rates Rising in the United States?

Some theories see poor individuals as responsible for their own poverty, and other theories view poverty as produced and reproduced by structural forces in society. These approaches are sometimes described as "blame the victim" and "blame the system" theories, respectively. We shall briefly examine each.


A man reads from the Scriptures in a nineteenth-century homeless shelter. According to the commonly held belief of the time, the poor were responsible for their circumstances due to lack of skills, motivation, or, as this engraving suggests, moral fiber.

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There is a long history of attitudes holding the poor responsible for their own disadvantaged positions. Often, explanations for poverty targeted the lifestyles and attitudes of poor people. Anthropologist Oscar Lewis (1968) proposed an early version of such explanations, which argues that poverty results from a larger social and cultural atmosphere into which poor children are socialized. The culture of poverty is transmitted across generations because young people see little point in aspiring to something more. Instead, they resign themselves to a life of impoverishment.

The culture of poverty thesis was taken further by Charles Murray (1984), who controversially placed individuals who are poor through "no fault of their own"—such as widows or widowers, orphans, or the disabled—into a different category from those who are part of the dependency culture. This term refers to poor people who rely on welfare rather than entering the labor market. Murray argued that the growth of

the welfare state undermines personal ambition and the capacity for self-help; welfare erodes people's incentive to work.

These ideas were reflected in government policies beginning in the 1970s. President Ronald Reagan popularized the term "welfare queen" in the mid-1970s, along with the notion that welfare recipients—often implied to be Black women—were too lazy to work, profiting instead from public benefits paid for by hardworking taxpayers. In his 1992 presidential campaign, Bill Clinton promised to "end welfare as we know it;" he delivered on this promise in 1996, when he signed into law the Personal Responsibility and Work Opportunity Act (popularly known as the Welfare to Work Act).

Sociologists who study poverty tend to reject the idea that poverty results from welfare dependency, arguing that larger social processes produce conditions of poverty that are difficult for individuals to overcome. Structural forces within society—differences in opportunity that are associated with race, class, gender, ethnicity, occupational position, educational attainment, and so forth—shape the way in which resources are distributed (Wilson, 1996, 2011). Advocates of this approach argue that the perceived lack of achievement among the poor is a consequence of their constrained situations, not a cause of it. In a recent book, sociologist Matthew Desmond (2023a) asks why the richest country in the world—whose GDP exceeds that of Japan, Germany, the United Kingdom, India, France, and Italy combined—has higher poverty rates than other advanced economies. A major part of the answer, he argues, involves a national culture and policies that favor wealth accumulation at the top, and a steady stream of low-cost goods for everyone that masks the degree of inequality that underlies poverty. While systemic factors such as globalization, the offshoring of jobs, and racism and sexism are important, Desmond emphasizes that the cause is not a "culture of poverty" but rather government policies that—contrary to popular belief—favor everyone but the poor. For example, homeowner subsidies (such as deductions for mortgage interest payments that reduce one's income tax) are more than three times as great as government housing assistance allotted for low-income families. In Desmond's view, "The American government gives the most help to those who need it least. This is the true nature of our welfare state" (Desmond, 2023b). Reducing poverty thus requires policy measures aimed at distributing income and resources more equally throughout society; such policy measures include child-care

subsidies, a minimum hourly wage, and guaranteed income levels for families.

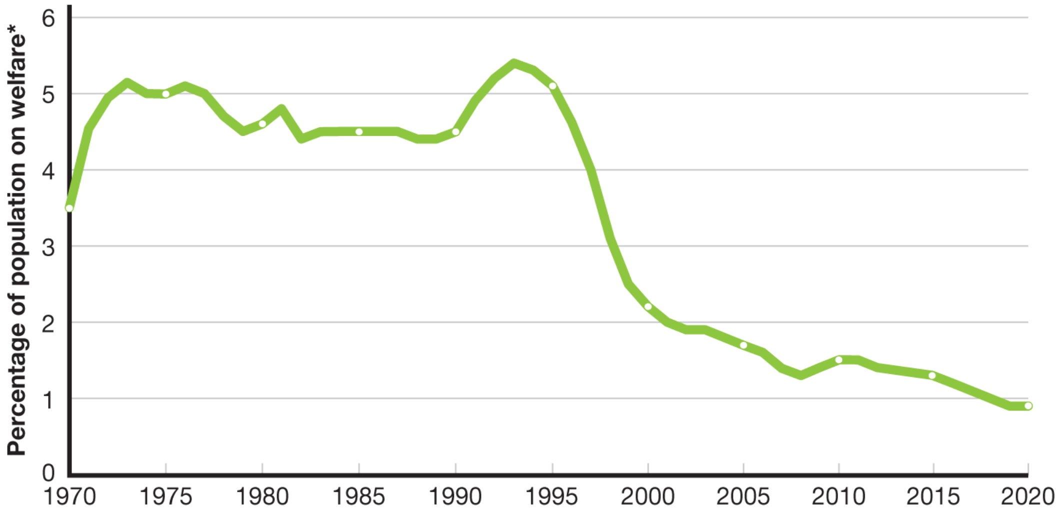
Sociologists emphasize the systemic or structural causes of poverty. While lack of individual initiative may sometimes play a part, systemic sources of inequality are key. As we have seen throughout this chapter, there are major advantages conferred by being born higher up on the income and wealth ladder—and major disadvantages from being born at the bottom. Moreover, these advantages (or disadvantages) are amplified by what is happening in the U.S. economy. During a period of growth, new opportunities are created; a rising tide, as the expression goes, lifts all boats. During a time of economic decline, such as a recession, or stagnation, the poor suffer the most.

# What Can Be Done to Combat Poverty?

In past economic downturns—beginning with the New Deal policies enacted by the FDR administration during the Great Depression of the 1930s—government transfers helped blunt the effects. Unemployment insurance, welfare benefits, antipoverty programs, and government stimulus spending helped create jobs, benefiting those at the bottom and thereby reducing inequality (see Figure 8.8). These reforms also helped reduce inequality in the long run by transferring wealth (in the form of higher taxes) from richer Americans to poorer Americans. Can contemporary government policies effectively reduce poverty?

Figure 8.8

**PERCENTAGE OF THE U.S. POPULATION ON WELFARE, 1970–2020**




*Percentage of persons who received AFDC or TANF cash assistance.

Source: Crouse, 2022.

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Critics of government spending on poverty alleviation argue that it promotes "welfare dependency," meaning that poor people become materially and psychologically dependent on the very programs that are supposed to enable them to become independent. Others deny that such dependency is widespread. "Being on welfare" is a source of shame, they say, and most people on welfare usually try to escape from it.

Recently, we have seen a shift in public opinion with regard to the role of government in helping the poor. The Pew Research Center regularly asks a national sample of Americans whether they believe that "poor people today have it easy because they can get government benefits without doing anything in return," as opposed to "poor people have hard lives because government benefits don't go far enough to help them live decently." The 2014 poll found that 47 percent chose the former option, while 43 percent chose the latter. Twenty years ago, the split was 53 percent to 39 percent. There has been a clear shift in opinion toward the belief that the government is failing to do enough to help the poor (Horowitz et al., 2020b).

President Bill Clinton enacted sweeping welfare reform designed to get people off the welfare rolls. In a sense, this law provided a test case of the "welfare dependency" thesis. The Temporary Assistance for Needy

Families (TANF) program, which took effect in 1997, replaced earlier welfare programs by requiring that welfare recipients begin work after receiving benefits for only two years; families would be cut off entirely after a cumulative five years of assistance. Before this reform, the federal government imposed no time limits or work requirements on welfare recipients, many of whom are single mothers.

On the one hand, the welfare-to-work approach was a resounding success: It reduced welfare claims from 5.1 million families to 2.7 million families in the first three years. Employment rates did increase somewhat among welfare recipients, and the 61 percent of those who left welfare were able to find work. On the other hand, nearly one out of every five welfare recipients was unable to find work (or, indeed, any source of independent income), while another fifth were forced to rely on romantic partners, family members, or private charities for support. About half of those who did get a job wound up earning less than they had received on welfare; less than a quarter had health insurance through their employer (Loprest, 1999). For low-income mothers, the costs of leaving welfare for work can outweigh the advantages since they face expenses for food, rent, child care, and other necessities that often exceed their income. In addition, their jobs tend to be less stable and pay less than welfare (Edin & Lein, 1997).

Thus, critics argue that the apparent success of welfare-to-work initiatives conceals troublesome patterns in the experiences of those who lose their welfare benefits. Moreover, even the most hopeful studies were conducted during a period of economic expansion. When growth slows or declines, it becomes difficult, if not impossible, for welfare recipients to find any jobs at all.

# How Will These Economic Patterns Affect Your Life?

Sometime in the next few years, you will graduate from college and face the prospect of starting a career. Do you have any idea what you will do? Perhaps you will start your own business or work your way up the hierarchy of an organization in a formal career. You may go to graduate school, take an unpaid internship, or volunteer for an organization such as

the Peace Corps. After reading this chapter, have your hopes and plans changed in any way?

Research findings on social stratification and mobility may have important implications for your economic future. According to the U.S. Bureau of Labor Statistics (2022b), among the 20 occupations predicted to increase the most rapidly between 2021 and 2031, 11 currently pay less than the 2021 median income (roughly $71,000). Three of the four occupations that will provide the largest number of new jobs—1.6 million over the next decade—are home health and personal care aides (924,000 jobs), cooks and restaurant workers (459,000 jobs), and fast-food and counter workers (243,000 jobs). These are all jobs that pay $30,000 or less a year; only one (home health and personal care aides) typically requires a high school diploma or equivalent.

As we have noted, a college degree can clearly make a big difference in one's future earnings. Virtually all the higher-paying jobs over the next decade will require a minimum of a college degree. Four rapidly growing occupations, providing 742,000 new jobs, currently pay more than $100,000 annually: medical and health service managers (136,200 jobs); nurse practitioners, nurse anesthetists, and nurse midwives (112,000 jobs); software developers (370,600 jobs); and financial managers (123,100 jobs). All typically require at least a BA degree (the nursing occupations require an MA) (U.S. Bureau of Labor Statistics, 2022d).

Of course, much can change this outlook over the coming decade. Advances in artificial intelligence may radically alter the occupational landscape, creating new jobs in high-tech fields while eliminating jobs that can be performed more efficiently and cheaply by robots or bots (see Chapter 14). In the past, globalization meant that U.S. workers in many well-paying manufacturing and services industries were losing their job to low-wage labor around the world. Whether this will continue in the future is uncertain. The goal of government policies today is to reverse this trend by encouraging U.S. businesses to "buy American" rather than rely on global supply chains. Whether these policies will succeed remains an open question (see Chapters 9 and 20). Climate change, pandemics, and global conflict may all play unpredictable roles in shaping our economic future.

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**CONCEPT CHECKS**

1. **Contrast the "culture of poverty" argument and structural explanations for poverty.**
2. **How has globalization affected the life chances of young adults in the United States today?**

---

# Glossary

Kuznets curve
: A formula showing that inequality increases during the early stages of capitalist development, then declines, and eventually stabilizes at a relatively low level; advanced by the economist Simon Kuznets.

culture of poverty
: The thesis, popularized by Oscar Lewis, that poverty is not a result of individual inadequacies but instead the outcome of a larger social and cultural atmosphere into which successive generations of children are socialized. The culture of poverty refers to the values, beliefs, lifestyles, habits, and traditions that are common among people living under conditions of material deprivation.

dependency culture
: A term popularized by Charles Murray to describe individuals who rely on state welfare provision rather than entering the labor market. The dependency culture is seen as the outcome of the "paternalistic" welfare state that undermines individual ambition and people's capacity for self-help.

# THE BIG PICTURE

# Chapter 8

## Stratification, Class, and Inequality

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**Exercises:** Thinking Sociologically

1. If you were doing your own study of status differences in your community, how would you measure people's social class? Explain why you would take the particular measurement approach you've chosen. What would be its value(s) and shortcoming(s) compared with those of alternative measurement procedures?
2. Using occupation and occupational change as your mobility criteria, view the social mobility within your own family and explain why you think people in your family have moved up, moved down, or remained at the same status level. Apply these terms: *upward and downward mobility, intragenerational and intergenerational mobility.*

# BASIC CONCEPTS p. 247

## Learning Objectives

Learn about social stratification and the importance of social background in an individual's chances for material success.

### Terms to Know

social stratification • intersectionality • structured inequalities • slavery • caste • class system • class • life chances • income • wealth • social capital • cultural capital

### Concept Checks

1. How is the concept of class different from that of caste?
2. What are the principal determinants of social stratification?
3. What is the difference between wealth and income, and why does it matter for social stratification?
4. What are two examples of noneconomic indicators of one's social class?

## THEORIES OF STRATIFICATION IN MODERN SOCIETIES p. 257

### Learning Objectives

Know the most influential theories of stratification, including those of Karl Marx, Max Weber, and Erik Olin Wright.

### Terms to Know

means of production • bourgeoisie • proletariat • surplus value • communism • status • pariah groups • contradictory class locations

### Concept Checks

1. According to Karl Marx, what are the two main classes, and how do they relate to each other?

2. What are the two main differences between Max Weber's and Karl Marx's theories of social stratification?
3. According to Kingsley Davis and Wilbert E. Moore, how does social stratification contribute to the functioning of society? What is wrong with this argument, according to Melvin Tumin?
4. What does Erik Olin Wright mean by "contradictory class location"? Give an example of a type of worker who falls into this category.

# RESEARCH ON SOCIAL STRATIFICATION TODAY p. 263

## Learning Objectives

Know the class differences in U.S. society, what influences them, and how they are defined and determined. Recognize the ways in which the gap between rich and poor has grown larger. Learn the processes by which people become marginalized in a society and the forms this marginalization takes.

## Terms to Know

upper class • middle class • working class • lower class • social mobility • intergenerational mobility • intragenerational mobility • structural mobility • exchange mobility • absolute poverty • relative poverty • poverty line • working poor • feminization of poverty • homeless

## Concept Checks

1. What are the major social class groups in the United States today? Describe at least two ways (other than income) that these groups differ from one another.
2. Contrast intragenerational and intergenerational mobility.
3. According to classic studies of mobility in the United States, how does family background affect one's social class in adulthood?
4. Describe the demographic characteristics of the poor in the United States.

5. Why are women and children at a high risk of becoming impoverished?

# UNANSWERED QUESTIONS p. 280

## Learning Objectives

Learn about competing explanations for why poverty exists and the means for combating it. Understand your own chances for social mobility. Learn how changes in the U.S. economy since the 1970s have led to growing inequalities.

## Terms to Know

Kuznets curve • culture of poverty • dependency culture

## Concept Checks

1. Contrast the "culture of poverty" argument and structural explanations for poverty.
2. How has globalization affected the life chances of young adults in the United States today?

# Glossary

social stratification
: The existence of structured inequalities between groups in society in terms of their access to material or symbolic rewards. While all societies involve some forms of stratification, only with the development of state-based systems did wide differences in wealth and power arise. The most distinctive form of stratification in modern societies is class divisions.

intersectionality
: A sociological perspective that holds that our multiple group memberships affect our lives in ways that are distinct from single

group memberships. For example, the experience of a Black woman may be distinct from that of a White woman or a Black man.

structured inequalities
: Social inequalities that result from patterns in the social structure.

slavery
: A form of social stratification in which some people are owned by others as property.

caste
: A social system in which one's social status is held for life.

class system
: A system of social hierarchy that allows individuals to move among classes. The chief bases of class are income, ownership of wealth, education, occupation, and lifestyle.

class
: Although it is one of the most frequently used concepts in sociology, there is no clear agreement about how the notion of class should be defined. Most sociologists use the term to refer to socioeconomic variations between groups of individuals that create variations in their material prosperity and power.

life chances
: A term introduced by Max Weber to signify a person's opportunities for achieving economic prosperity.

income
: Money received from paid wages and salaries or earned from investments.

wealth
: Money and material possessions held by an individual or group.

social capital
: The relational networks that provide a person with tangible resources (such as wealth) and intangible ones (such as personal connections).

cultural capital
: The accumulated cultural knowledge within a society that confers power and status.

means of production
: The means whereby the production of material goods is carried on in a society, including not just technology but also the social relations between producers.

bourgeoisie

People who own companies, land, or stocks (shares) and use these to generate economic returns.

proletariat

People who sell their labor for wages, according to Karl Marx.

surplus value

In Marxist theory, the value of a worker's labor power left over when an employer has repaid the cost of hiring the worker.

communism

A social system based on everyone owning the means of production and sharing in the wealth it produces.

status

The social honor or prestige a particular group is accorded by other members of a society. Status groups normally display distinct styles of life—patterns of behavior that the members of a group follow. Status privilege may be positive or negative.

pariah groups

Groups who suffer from negative status discrimination—they are looked down on by most other members of society.

contradictory class locations

Positions in the class structure, particularly routine white-collar and lower managerial jobs, that share characteristics with the class positions both above and below them.

upper class

A social class broadly composed of the more affluent members of society, especially those who have inherited wealth, own businesses, or hold large numbers of stocks (shares).

middle class

A social class composed broadly of those working in white-collar and lower managerial occupations.

working class

A social class broadly composed of people working in blue-collar, or manual, occupations.

lower class

A social class comprising those who work part-time or not at all and whose household income is typically lower than $31,000 a year.

social mobility

Movement of individuals or groups between different social positions.

intergenerational mobility

Movement up or down a social stratification hierarchy from one generation to another.

intragenerational mobility

Movement up or down a social stratification hierarchy within the course of a personal career.

structural mobility

Mobility resulting from changes in the number and kinds of jobs available in a society.

exchange mobility

The exchange of positions on the socioeconomic scale such that talented people move up the economic hierarchy while the less talented move down.

absolute poverty

A state of poverty in which one lacks the minimal requirements necessary to sustain a healthy existence.

relative poverty

Poverty defined according to the living standards of the majority in any given society.

poverty line

An official government measure to define those living in poverty in the United States.

working poor

People who work but whose earnings are not enough to lift them above the poverty line.

feminization of poverty

An increase in the proportion of the poor who are female.

homeless

People who have no place to sleep and either stay in free shelters or sleep in public places not meant for habitation.

Kuznets curve

A formula showing that inequality increases during the early stages of capitalist development, then declines, and eventually stabilizes at a relatively low level; advanced by the economist Simon Kuznets.

culture of poverty

The thesis, popularized by Oscar Lewis, that poverty is not a result of individual inadequacies but instead the outcome of a larger social and cultural atmosphere into which successive generations of children are socialized. The culture of poverty refers to the values, beliefs, lifestyles, habits, and traditions that are common among people living under conditions of material deprivation.

dependency culture

A term popularized by Charles Murray to describe individuals who rely on state welfare provision rather than entering the labor market. The dependency culture is seen as the outcome of the "paternalistic" welfare state that undermines individual ambition and people's capacity for self-help.

# 9 Global Inequality

Which three men topped the list of the world's richest people in early 2022?

1. **Jeff Bezos, founder and CEO of Amazon; Mark Zuckerberg, founder and CEO of Facebook; and Warren Buffett, founder and CEO of Berkshire Hathaway**
2. **Bill Gates, cofounder of Microsoft; Jeff Bezos, founder and CEO of Amazon; and Mark Zuckerberg, founder and CEO of Facebook**
3. **Elon Musk, cofounder of Tesla and SpaceX; Jeff Bezos, founder and CEO of Amazon; and Bernard Arnault, chairman of LVMH**

Moët Hennessy Louis Vuitton

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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## LEARNING OBJECTIVES

1. **Basic Concepts** Understand the differences in wealth and power between countries.
2. **Theories of Global Inequality** Learn several sociological theories for why some societies are wealthier than others, and understand the strengths and weaknesses of each.
3. **Research on Global Inequality Today** Recognize the impact on people throughout the world of different economic standards of living, including one's health, diet, and educational opportunities.
4. **Unanswered Questions** Understand the causes of inequality—both between countries and within countries—in the world today. Learn who makes up the global poor and whether the proportion of the population living in poverty is increasing or decreasing. Consider how globalization might shape global inequality in the future.

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If you went out on a limb and guessed Elon Musk, Jeff Bezos, and Bernard Arnault—someone you most likely have never heard of—you were right! Even though most Americans have never heard of the French billionaire Bernard Arnault, in March 2022 he ranked third, with a net worth (the value of everything he owned minus everything he owed) of $158 billion. Musk got top billing, with a net worth of $219 billion; Bezos was not far behind with a net worth of $171 billion (Peterson-Withorn, 2022). While the sources of Musk's wealth (Tesla and SpaceX) and Bezos's wealth (Amazon) are known by just about everyone, LVMH Moët Hennessy Louis Vuitton—a giant corporation that is the world's largest maker of luxury goods—is hardly a household name. Among the products that propelled Arnault to third place are Louis Vuitton goods (you can pick up a pair of men's V.N.R sneakers for a mere $1,190; women's denim monogrammed checked dresses go for only $2,250); TAG Heuer watches (prices range from $1,000 to $74,750); and Dom Pérignon champagne (a bargain at $150 a bottle; a rare vintage once fetched the staggering sum of $84,700!).

The fortunes of these three men illustrate some important themes that will be developed throughout this chapter. Musk was made wealthy by the companies he's cofounded, including Tesla, an electric car maker, and SpaceX, a rocket producer, among others. Bezos's wealth stems from the retail revolution he launched—online shopping combined with home delivery. Amazon has made consumption virtually effortless and now employs three-quarters of a million workers. It has also put many stores (along with the jobs they provided) out of business.

Arnault, however, is a relative newcomer to the top tier of the world's richest people. While there have always been wealthy consumers (that $84,700 bottle of Dom Pérignon champagne was sold at a New York City wine auction in 1959), there are now far more superrich people in the world today than ever before in human history. Their wealth has made the sale of luxury goods, from private jets and yachts to $75,000 watches, a highly profitable business for Arnault and others. The computer and retail revolutions, launched by Gates, Bezos, and other entrepreneurs, are a part of the story. Globalization—the increased economic, political, and social interconnectedness of the world—is another.

Over the past several decades, globalization has produced a skyrocketing number of billionaires. When *Forbes* first started keeping a list in 1987, it could identify only 140 billionaires throughout the world (Kilachand, 2012). By 2022, the most recent year for which *Forbes* has data, there were 2,668 billionaires, with a combined net worth of $12.7 trillion (Peterson-Withorn, 2022). Of these billionaires, 735 (29 percent) were from the United States, while China came in second with 607 billionaires (19 percent) (Peterson-Withorn, 2022). While the United States still has the world's largest economy (China is rapidly closing in), the "rise of the rest" has brought great wealth to a growing number of people in other countries (Zakaria, 2009).

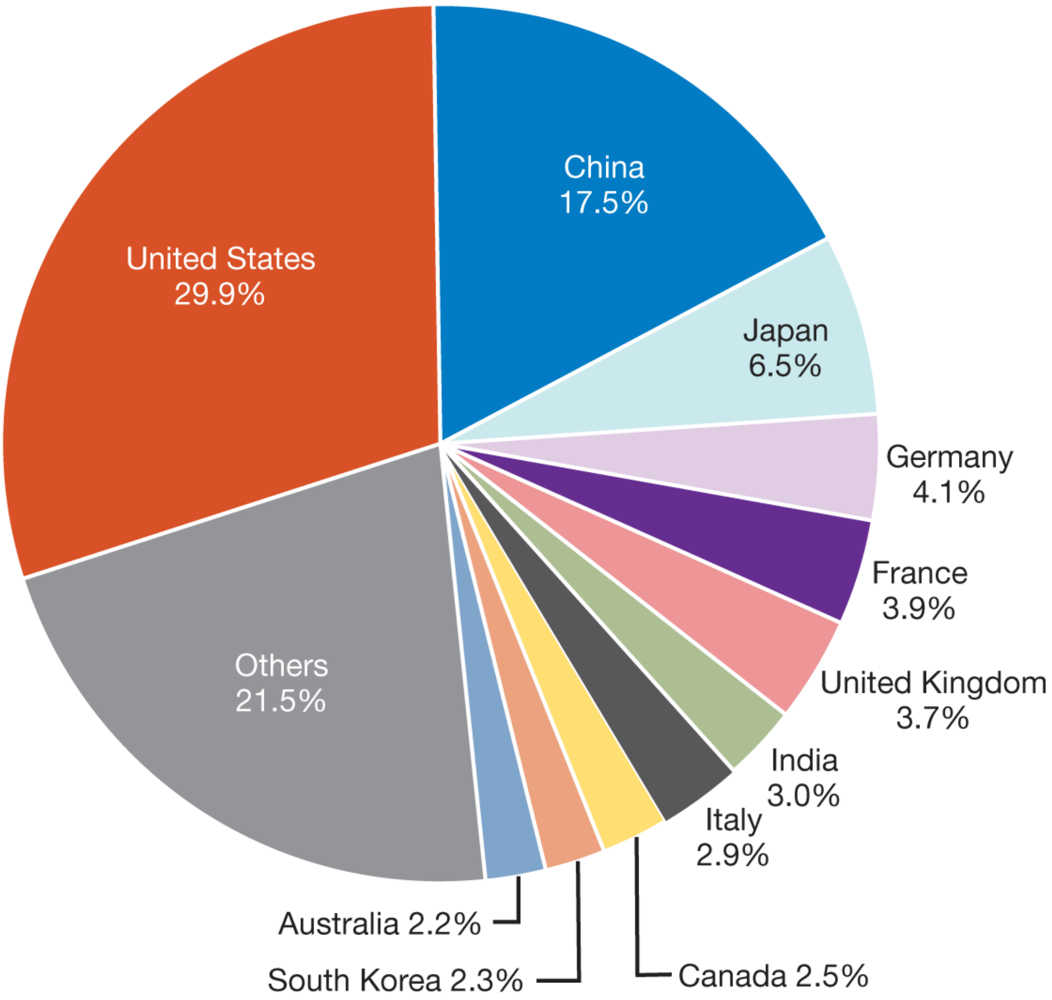
As globalization has created a growing number of billionaires, it has also resulted in growing inequality. The world's 2,668 billionaires could easily fit into a large lecture hall or movie theater. In 2019, billionaires—despite accounting for an insignificant fraction of the world's 7.7 billion people—owned 2.0 percent of the world's wealth (the world's wealth is estimated at $361 trillion) (Shorrocks et al., 2019b). If we extend our lens beyond billionaires, to look at the richest 1 percent of the world's population, it turns out that the top 1 percent possesses more of the world's wealth (63 percent) than the remaining 99 percent (37 percent)

(Oxfam International, 2023). The United States, by itself, accounts for 29.9 percent of the world's wealth (**Figure 9.1**) (Shorrocks et al., 2022a); yet within the United States, vast inequality also exists. According to Federal Reserve data, the richest 1 percent of U.S. households accounted for 32.3 percent of all the wealth in the country by the end of 2021 (Frank, 2022).

Globalization has produced not only opportunities for unthinkable wealth but also widespread poverty and suffering. Consider Mossammat Rebecca Khatun, a young woman who sewed clothing in the Rana Plaza industrial building in Bangladesh, often laboring 13 hours a day, six days a week, for weekly earnings unlikely to exceed $11. Rebecca, and thousands like her, made clothing for major European and U.S. brands and retailers. When Rana Plaza collapsed on April 24, 2013, 1,137 people died and thousands were injured. Rebecca was one of the lucky ones: She survived, buried alive for two days before rescuers reached her. But she lost her right foot and her entire left leg, and she still suffers from constant pain. Rebecca's mother, who worked in the same building, was not so fortunate: Her body was never found (Parveen, 2014). Billions of workers such as Rebecca are being drawn into the global labor force, many working in oppressive and unsafe conditions that would be unacceptable, if not unimaginable, under U.S. labor laws. And these are the fortunate ones. Those outside the global economy are frequently even worse off.

Figure 9.1

**DISTRIBUTION OF THE WORLD'S WEALTH, 2022**




Source: Shorrocks et al., 2022a.

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In the previous chapter, we noted vast differences in individuals' income, wealth, work, and quality of life. Just as we can speak of rich or poor individuals within a country, we can also talk about rich or poor countries within the world system. A country's position in the global economy affects how its people live, work, and die. In this chapter, we examine the differences in wealth and power between countries in the late twentieth and early twenty-first centuries. We examine differences in economic standards of living and then turn to a discussion of different theories on the causes of global inequality and what can be done about it. We conclude by considering some unanswered questions concerning economic inequality in an age of globalization. As we will see throughout this chapter, globalization has produced great wealth—as well as great inequality—both between and within countries.

# Glossary

globalization
: The development of social and economic relationships stretching worldwide. In current times, we are all influenced by organizations and social networks located thousands of miles away. A key part of the study of globalization is the emergence of a world system—for some purposes, we need to regard the world as forming a single social order.

# 1 BASIC CONCEPTS

**Understand the differences in wealth and power between countries.**

Global inequality refers to the systematic differences in wealth and power between countries. These differences exist alongside differences within countries: Even the wealthiest countries have growing numbers of poor people. Yet it is important to remember that while some less wealthy nations, such as China, India, or Mexico, are producing many of the world's superrich, there is still a huge difference between being poor in a wealthy nation such as the United States and starving to death in a poor nation. Sociology's challenge is not merely to identify such differences but to explain why they occur—and how they might be overcome.

The most commonly used way to classify countries in terms of global inequality is to compare the wealth produced by each country for its average citizen. The gross national income, or GNI, is a measure of the total income earned as a result of a country's yearly output of goods and services, including any income earned abroad. We use GNI here, rather than the more commonly used gross domestic product (GDP), since the latter includes only income produced within the country. When divided by the number of people in a country, this provides one commonly used estimate of average (per person) income. The World Bank (2023c), an international lending organization that provides loans for development projects in poorer countries, uses this measure to classify countries as either high income (based on an annual average per person income greater than $13,205), upper-middle income ($4,256–$13,205), lower-middle income ($1,086–$4,255), or low income ($1,085 or less). This system of classification is often used to show the vast differences in living standards that exist between countries. The World Bank in 2023 identified 81 countries (out of 217) as high income, 54 as upper-middle income, 54 as lower-middle income, and 28 as low income.

## High-Income Countries

High-income countries are generally those that industrialized first, a process that began in England some 250 years ago and then spread to the

rest of Europe, the United States, and Canada. In the 1960s, Japan joined their ranks, while Singapore, Hong Kong, and Taiwan did so only within the last several decades (Global Map 9.1). Most high-income countries are found in Europe, North America (United States, Canada), and the East Asian/Pacific region (Australia, New Zealand, Japan, South Korea, Singapore, Taiwan). There are also a few high-income countries in South America (Chile and Uruguay), Central America (Panama), and the Middle East (Israel; and such oil-rich countries as Saudi Arabia, Kuwait, and the United Arab Emirates), as well as a scattering of islands in the Caribbean (for example, the Bahamas and Puerto Rico). The average annual income for people living in high-income countries was $44,275 in 2018. High-income countries are home to only 16 percent of the world's population (1.2 billion people), yet they command 63 percent of the world's total GNI (World Bank, 2020a). Although they often have large numbers of poor people, they also offer decent housing, adequate food, drinkable water, and other comforts—a standard of living unimaginable by the majority of the world's people.

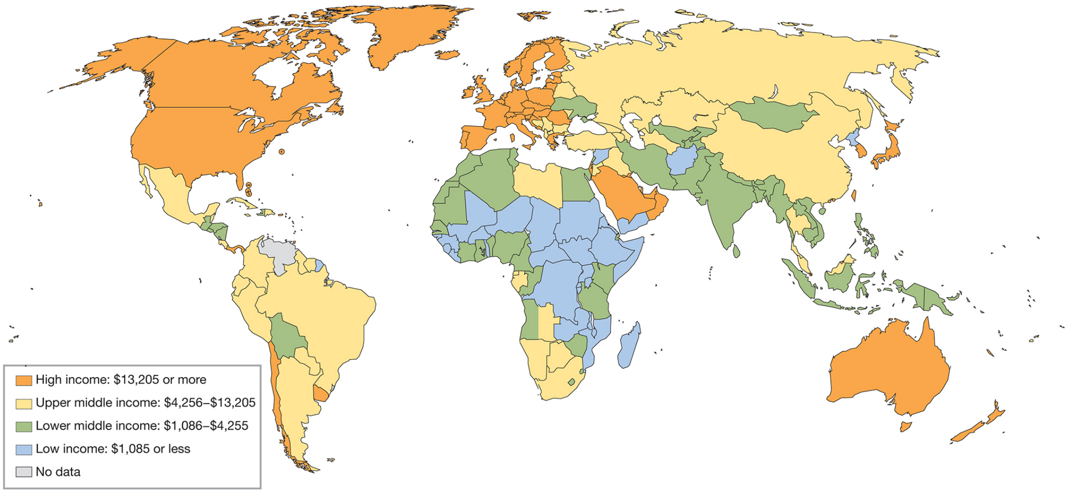
# Middle-Income Countries

Middle-income countries (including lower-middle and upper-middle income) are primarily found in East and Southeast Asia, and also include the oil-rich countries of the Middle East and North Africa, a few countries in the Americas (Mexico, some Central American and Caribbean countries such as Cuba, and most countries in South America), and the once-Communist republics that formerly made up the Soviet Union and its East European allies. Having begun to industrialize relatively late in the twentieth century, most are neither as developed nor as wealthy as the high-income countries. The countries of the former Soviet Union, however, are highly industrialized, although, in many cases, their living standards eroded during their transition to capitalism after the collapse of communism during the period 1979–1991. In 2018, middle-income countries were home to 75 percent of the world's population (5.7 billion people) but accounted for only 36 percent of the output produced that year. Although many residents are substantially better off than their neighbors in low-income countries, most do not enjoy anything resembling the standard of living common in high-income countries (World Bank, 2020d).

Global Map 9.1

**RICH AND POOR COUNTRIES: THE WORLD BY INCOME, 2023**

Like individuals in a country, the countries of the world can be seen as economically stratified. In general, those countries that experienced industrialization the earliest are the richest, while those that remain agricultural are the poorest. An enormous, and growing, gulf separates the two groups.




Source: World Bank, 2023c.

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# Low-Income Countries

Low-income countries, the world's poorest, have mostly agricultural economies; some are just beginning to industrialize. Scholars debate the reasons for their late industrialization and widespread poverty, as we will see later. They include much of eastern, western, and sub-Saharan Africa; North Korea in East Asia; Nepal in South Asia; and Haiti in the Caribbean. In 2018, the low-income countries were home to 9 percent of the world's population (roughly 705 million people) but just 0.1 percent of the world's GNI; the average annual income for people living in these countries was only $841 in 2018, one-fiftieth the amount of persons living in high-income countries. Moreover, this inequality is increasing—partly as a result of higher fertility. In fact, there is an inverse relationship between income level and population growth: In general, the poorer the

country, the faster the growth in population. Between 2000 and 2018, the population of high-income countries increased 12 percent, while that of low-income countries increased 61 percent (World Bank, 2020a). While the rates of population growth are predicted to slow over the coming years for all income categories of countries, between 2018 and 2028 the number of people living in low-income countries is predicted to grow more than nine times faster than the number of people living in high-income countries (29 percent versus 3 percent) (World Bank, 2019b). In poorer countries, large families are more likely to be a cultural norm because children can be an economic asset. They contribute to household and family farm labor, and they are increasingly likely to work in factories as well. (In wealthy countries, smaller families are the norm: In most families children do not typically contribute to household income, but instead depend on their parents' earnings for their lifestyles.) In many low-income countries, people struggle with poverty, malnutrition, and starvation. Most people live in rural areas, although in recent years hundreds of millions of people have been moving to densely populated cities, where they live either in dilapidated housing or on the streets (see Chapter 19).

# Is Global Economic Well-Being Improving?

Based on the World Bank's income categories, for the world as a whole, at least in terms of average incomes, there has been considerable progress over the last two decades. In only 22 years (1999–2021), the number of high-income countries grew by 28; upper-middle-income countries by 14. As countries have moved up into the two upper-income categories, the number of lower-middle-income countries dropped by 3; low-income countries by 37 (Prydz & Wadhwa, 2019; World Bank, 2023c). And looking at the number of countries in each income category tells only part of the story, since when we look at the number of people in each category, the changes are even more striking. Twenty-two years ago, 60 percent of the world's population lived in low-income countries; today, the figure is only 9 percent. The number of people living in lower-middle-income countries grew from 15 percent to 43 percent; the number living in upper-middle-income countries grew from 10 percent to 32 percent. Significantly, however, the number of people living in high-

income countries has been fairly constant at 15–16 percent over the 22-year period: The richest tier of nations remains a fairly exclusive club (Prydz & Wadhwa, 2019; World Bank, 2023c).

Much of this upward movement of people is the result of the economic success of two highly populous countries, China and India, which together account for more than a third of the world's population. After taking inflation into account, China's average income in 1998 was $800; by 2018, it had grown to $9,470, a historically unprecedented 12-fold increase in only 20 years. China moved from the bottom of the lower-middle-income category to the top of the upper-middle-income category and is poised to quickly join the ranks of high-income countries. Since China's 1.4 billion people account for nearly one out of every five persons on the planet, its economic success by itself has elevated a significant portion of the world population out of economic poverty. (We will focus on the reasons for China's success later in this chapter.) India's accomplishments are not quite as striking: Its average income grew from $410 in 1998 to $2,020 in 2018, a five-fold increase, enough to raise India from the low-income category to the lower-middle-income category —still a significant improvement for many of India's 1.4 billion people (Prydz & Wadhwa, 2019).

# Going Beyond Purely Economic Measures of Global Well-Being

There are, however, a number of problems in using the World Bank income categories as measures of success. One problem is that using average income masks income inequality *within* each country. The average incomes for each economy, on which these data are based, are skewed upward when a relatively small portion of the population has extremely high incomes. China, for example, has raised several hundred million people out of poverty into middle-class status and, as we have seen, has many billionaires—yet China still has hundreds of millions of impoverished peasants. In contrast, the United States is in the upper ranks of high-income countries, with an average income in 2018 of $63,080 (World Bank, 2019b); yet the United States has more than a half million homeless people on any given day (Henry et al., 2018) and some 38 million people living in poverty (Creamer et al., 2022a).

This raises a second problem: Comparing countries on the basis of economic output alone may be misleading because GNI includes only goods and services produced for cash sale that are known to the government. Many people in low-income countries produce only for their own families or for barter, which involves noncash transactions. The value of their crops and animals is not reflected in the official statistics. The economy also includes people who are paid "off the books" for their work—gardeners or housekeepers who are paid by cash or check with no official records kept; street vendors; those who engage in illegal activities of all sorts. While this so-called informal sector is found in all countries, it is especially prevalent in poorer countries, where it may make an important contribution to the overall economy. According to a UN International Labour Organization (ILO) estimate, as many as 60 percent of all workers in the world engage in some type of informal work, most of them in poorer countries (ILO, 2018).

A third problem with classifying countries on the basis of income alone is that it can be misleading, since it obscures the difference between absolute and relative poverty. Absolute poverty occurs when persons cannot acquire basic life needs, including food, clothing, and shelter; starvation is often a way of life for those in this category. Relative poverty occurs when persons are poor relative to others in their society; they may struggle to make ends meet while their neighbors can more easily put food on the table or pay the rent. Most poverty in the United States is relative poverty; most of the poor are not starving or homeless, and even homeless people are often able to find shelters and food kitchens. By way of contrast, almost everyone in the African country of Burundi, where an average income in 2021 of $222 makes it the poorest country in the world, lives in absolute poverty (World Bank, 2021b). In Burundi, half the population is chronically hungry and agricultural production is too poor to meet the country's needs (World Food Programme, 2022).

Finally, economic output is not a country's whole story, since it fails to adequately capture important noneconomic aspects of people's lives. The United Nations Development Programme (UNDP) has developed a Multidimensional Poverty Index (MDPI) that combines 10 poverty-related indicators into a single weighted index, intended to provide a measure of *human development* rather than economic development alone. The indicators are grouped into three major categories that provide a

broad picture of one's quality of life: *health* (nutrition, child mortality), *education* (years of schooling, school attendance), and *standard of living* (materials used as cooking fuel, household sanitation, access to potable drinking water, household electricity, adequately constructed housing, possession of such basic assets as a bicycle or refrigerator) (UNDP, 2019b). Based on this measure, the UN estimates that 1.2 billion people around the world live in poverty, twice the number as measured by income alone (UNDP, 2022). The much higher numbers reflect aspects of poverty that are missed by purely economic indicators, such as the fact that more than a quarter of a billion children do not attend primary or secondary school, or that 5.4 million children die before they reach the age of five (UNDP, 2019).

This effort to measure aspects of human development, beyond purely economic growth, reflects a proposal first made by the Nobel Prize–winning Indian economist/philosopher Amartya Sen. Forty years ago, Sen argued that instead of focusing on purely economic indicators, institutions should look at the quality of life people are capable of achieving—the freedom to make fundamental life choices. Sen argued that indicators of such freedom were preferable to measures of income or wealth, since they reflected the capability people have to achieve the quality of life they prefer (Sen, 1979). Governments should be assessed not in terms of such measures as the average income of their country, but rather in terms of what their citizens are capable of achieving, given the public and private opportunities that are provided. For this reason, Sen's approach is termed the Capabilities Approach, since it emphasizes the degree to which people are capable of achieving a life they value, given the obstacles they face.

Sen's ideas (and efforts) shaped the United Nations' *Human Development Report*, an annual publication (first launched in 1990) that ranks countries on numerous social as well as economic indicators. The most recent *Report*, for example, distinguishes access to what it terms *basic capabilities* (early childhood survival, primary education, entry-level technologies, the ability to withstand minor life setbacks) from access to *more advanced capabilities* (high-quality health care and education, present-day technologies, the ability to withstand major life setbacks). This approach emphasizes the importance of the kinds of measures that sociologists, rather than economists, are likely to be concerned with. It

has led the UN to some startling conclusions that are not evident from economic data alone (UNDP, 2019b):

- Although there has been success in raising incomes worldwide, such things as lack of basic schooling, infant mortality, and starvation remain global problems.
- While differences in *basic capabilities* have declined, a "new generation" of differences in *enhanced capabilities* is emerging; lack of access to high-quality education or technology will prove a barrier to those who are left behind in the years to come.
- Inequalities accumulate through life, often reflecting deep power imbalances: Where people lack power, they lack the ability to shape the institutions—from education to health care to jobs—that will affect the life prospects of their children.

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**CONCEPT CHECKS**

1. **Explain how the World Bank measures global inequality, and discuss some of the problems associated with measuring inequality.**
2. **Compare and contrast high-income, middle-income, and low-income countries.**
3. **What is the Capabilities Approach to measuring well-being, and how does it provide a more sociological understanding of development than purely economic measures?**

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# Glossary

global inequality
: The systematic differences in wealth and power between countries.

GNI
: Gross national income, a commonly used measure based on total income earned as a result of a country's yearly output of goods and services, including income earned abroad.

absolute poverty
: A state of poverty in which one lacks the minimal requirements necessary to sustain a healthy existence.

relative poverty

Poverty defined according to the living standards of the majority in any given society.

Capabilities Approach

An approach to economic development that uses social indicators to emphasize the degree to which people are capable of achieving a life they value, given the opportunities they face.

# 2 THEORIES OF GLOBAL INEQUALITY

**Learn several sociological theories for why some societies are wealthier than others, and understand the strengths and weaknesses of each.**

What causes global inequality? How can it be overcome? In this section, we examine four different theories that have been advanced over the years to explain global inequality: neoliberal theories, dependency theories, world-systems theories, and global capitalism theories. Each approach has strengths and weaknesses. One shortcoming of all four is that they tend to underemphasize the role of women in economic development. By putting the theories together, however, we should be able to answer a question facing the 84 percent of the world's population living outside high-income countries: How can they move up in the world economy?

## Neoliberal Theories

Neoliberalism refers to the belief that the best economic consequences will result if individuals are entirely free from governmental constraint to make their own economic decisions. Government bureaucracy should not dictate which goods to produce, what prices to charge, how much to pay workers, or whether businesses should be prevented from polluting the environment. Such decisions should be left to the businesses themselves, which will respond to what the market demands: You, the consumer, freely choose from among competing brands, perhaps taking into account the working and environmental conditions under which the product is made. Neoliberal economic theories assume that, in the long run, everyone will be better off if such economic freedom is maximized.

The word *liberal* in *neoliberalism* refers to freedom—in this case, the freedom for producers and consumers alike to make their own economic decisions. It became a part of economic thinking with the publication of Adam Smith's *The Wealth of Nations* in 1776, which argued that

unrestricted industrial capitalism (which was then emerging) was the best avenue to economic growth. Liberal theories dominated economic belief until the 1930s, when the worldwide Great Depression caused the United States and other industrialized economies to question the belief that governments should play little or no role in the economy. A new economic theory called *Keynesianism*, which reflected the ideas presented in John Maynard Keynes's 1936 book, *The General Theory of Employment, Interest and Money*, called for a greatly expanded role of government in order to repair the economic damage done by the Great Depression. These ideas held sway for a half century. By the 1960s, the United States was providing Social Security pensions for retirees, health insurance for the elderly (Medicare) and the poor (Medicaid), insurance for those who lose their jobs, and welfare programs for the very poor, as well as a host of regulations aimed at protecting consumers, workers, and the environment. By the mid-twentieth century, it was generally accepted in the United States and other industrialized nations that supposedly "free markets" did not necessarily produce the best outcomes for everyone: Left unregulated, markets could favor the rich and powerful, lead to recurring economic crises, and produce a widening gap between rich and poor.

During the second half of the twentieth century, however, the old liberal economic ideas enjoyed a resurgence (hence the prefix *neo*, or "new," in *neoliberalism*). Their success was due in large part to a small group of highly influential University of Chicago economists, whose ideas resonated with businesses and conservative politicians (Van Overtveldt, 2007; Valdes, 2008). These ideas helped shape U.S. policies regarding low-income countries, especially in neighboring Latin America, where widespread poverty had made communism appealing to many peasants and workers. One strategy to counter such appeal, in the view of U.S. policy makers, was to help foster neoliberal capitalism in low-income countries, which would hopefully result in economic growth and thereby dampen the appeal of communism. The key was for these countries to open their borders to U.S.-financed foreign-aid programs that provided money, expert advisers, and technology to low-income countries, paving the way for U.S. corporations to make investments there (Berger, 1986; Ranis, 1996; Ranis & Mahmood, 1992; Rostow, 1961; Warren, 1980).

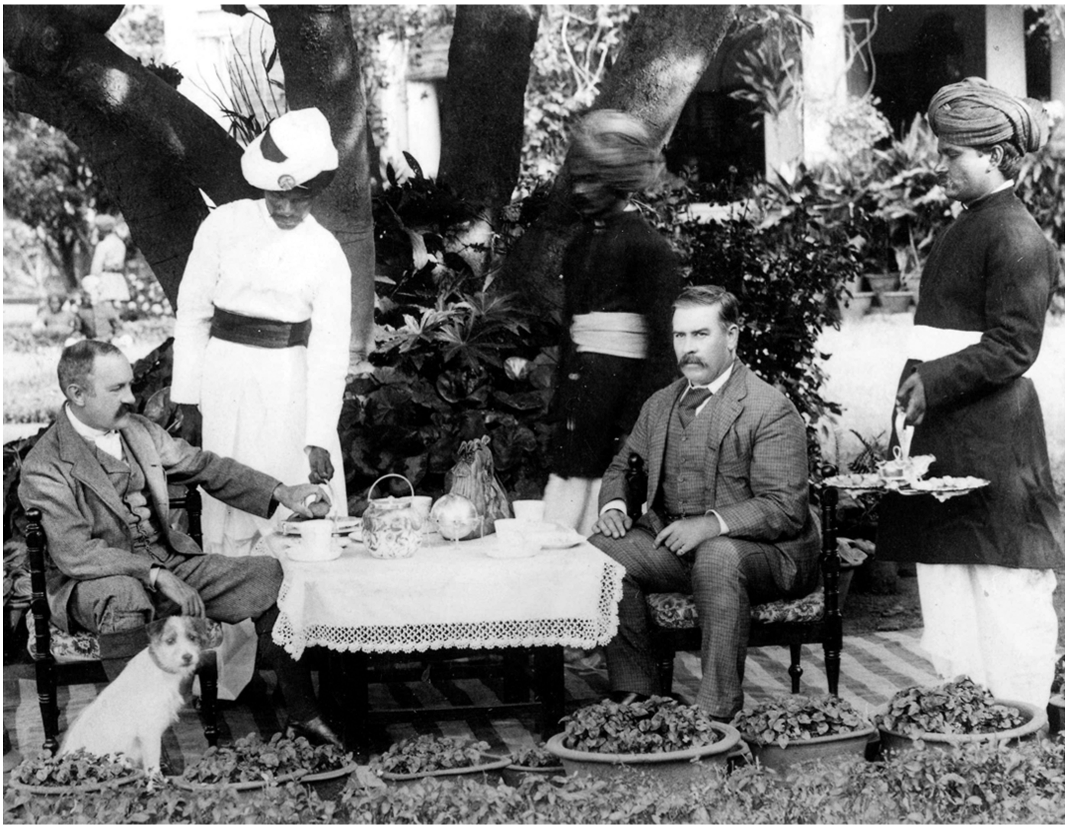
One influential proponent of such theories was W. W. Rostow, an economic adviser to former U.S. president John F. Kennedy, whose ideas

helped shape U.S. foreign policy toward Latin America during the 1960s. Rostow's explanation, termed modernization theory, argued that low-income societies could become "modern" (which meant resembling the United States and other high-income countries) only if they adopted modern economic institutions, technologies, and cultural values that emphasize savings and productive investment. According to Rostow (1961), the social institutions and traditional cultural values of low-income countries impeded their economic growth. One problem, it was argued, was that low-income countries' economies were overregulated by ineffective and often corrupt governments. Another concern was that their populations had cultural values favoring living for today rather than investing in the future, under the belief that poverty somehow reflected God's will. For low-income countries to "modernize," they needed to reduce the power and influence of corrupt government officials, jettison their traditional values and institutions, and invest in the future. The United States could facilitate this by providing low-cost loans for electrification and road and airport construction; providing technical assistance in the form of teachers, economic advisers, lawyers, and other consultants; and—importantly—getting these countries to encourage U.S. firms to invest in factories and large-scale agricultural production. Opening low-income country economies to U.S. corporate investment was seen as key to economic growth. Rostow used an aeronautical metaphor that policy makers could easily understand to make his case. He argued that "traditional societies" could "take off" into sustained economic growth if they followed his prescriptions, finally achieving the "modern" stage he termed "high mass consumption." This transition would occur when countries invested at least 10 percent of their GNI in productive economic activities—under strict U.S. tutelage, of course.

# Dependency Theories

During the 1960s, a number of sociologists and economists from the low-income countries of Latin America and Africa rejected Rostow's argument that their countries' economic poverty was due to their own cultural or institutional faults (Appelbaum, 2017). Instead, building on the theories of Karl Marx, they argued that contrary to Rostow and other neoliberal economists, capitalism was the problem, not the solution. In their view, global capitalist economic relations had made poor countries dependent on rich countries, locking them in a downward spiral of

exploitation and poverty (hence the term dependency theory). To better understand how such exploitative relations worked, dependency theory introduced new concepts that emphasized the relational nature of powerful rich countries and relatively powerless poor countries (recall that modernization theory placed the blame for poverty on the poor countries themselves). According to dependency theory, the most advanced industrial countries are best understood as being core countries in the world economy, in that they extract the lion's share of profits from weaker countries. Peripheral countries, therefore, are the low-income, largely agricultural countries that have a marginal role in the world economy and are thus dependent on the core countries for their trading relationships. The advanced industrial core countries (for example, the United States, Japan, and the countries of Western Europe) extract wealth, in the form of cheap labor and natural resources, from the poorer (and weaker) peripheral countries. In the view of dependency theory, this becomes a vicious downward cycle, in which the core countries in the world economy become richer, while the peripheral countries become increasingly impoverished.



Two British generals are served tea in Bangalore, India, which was part of the British Empire until 1947.

Such exploitative core-periphery relations became a major force with colonialism, which dates back centuries but achieved its high point in the nineteenth and early twentieth centuries. Powerful nations colonized other countries to procure raw materials (such as petroleum, copper, and iron) for their factories and to control markets for their manufactured products. Although colonialism typically involved European countries establishing colonies in North and South America, Africa, and Asia, some Asian countries (such as Japan) had colonies as well.

Even though colonialism largely ended after World War II, the exploitation did not: Corporations based in high-income countries continued to reap enormous profits from their branches in low-income countries. According to dependency theories, these global companies, often with the support of the powerful banks and governments of rich countries, established factories in poor countries, using cheap labor and raw materials to minimize production costs without governmental interference. In turn, the low prices for labor and raw materials prevented poor countries from accumulating the profit necessary to industrialize themselves. Local businesses that might have competed with foreign corporations were prevented from doing so. In this view, poor countries were forced to borrow from rich countries, thereby increasing their economic dependency.

Low-income countries are thus seen not as underdeveloped but as *misdeveloped* (Amin, 1974; Emmanuel, 1972; Frank, 1966, 1969a, 1969b, 1979; Prebisch, 1967, 1971). Except for a few local politicians and businesspeople serving the interests of the foreign corporations, people fall into poverty. Peasants must choose between starvation and working at near-starvation wages on foreign-controlled plantations and in foreign-controlled mines and factories. Dependency theorists rejected such exploitation, and some called for revolutionary changes that would push foreign corporations out of these countries altogether (Frank, 1966, 1969a, 1969b).

Whereas neoliberal theorists usually ignored political and military power, dependency theorists regarded the exercise of power as central to enforcing unequal economic relationships. Whenever local leaders questioned such unequal arrangements, their voices were suppressed. Unionization was usually outlawed, and labor organizers were jailed or killed. When people elected a government opposing these policies, it was likely to be overthrown by the country's military, often backed by armed

forces of the industrialized countries. Dependency theorists cited many examples, such as the role of the CIA in overthrowing the Marxist governments of Guatemala in 1954 and the socialist government in Chile in 1973, and in undermining support for the leftist government in Nicaragua in the 1980s. In the view of dependency theory, global economic inequality was ultimately backed up by force: Economic elites in poor countries, backed by their counterparts in wealthy ones, used police and military power to keep the local population under control.

The Brazilian sociologist Fernando Henrique Cardoso, who served as Brazil's president from 1995 to 2002, argued that ending dependency did not always require revolutionary changes, as dependency theorists tended to argue. Rather, he claimed, some degree of dependent development was possible—that under certain circumstances, dependent countries can still develop economically, although only in ways shaped by their reliance on wealthier countries (Cardoso & Faletto, 1979). In particular, the governments of these countries could help steer a course between dependency and development (Evans, 1979). The rise of the East Asian economies was a case in point: Although Hong Kong, Taiwan, Singapore, and South Korea were the targets of investments from core countries such as the United States, thanks to strong governments and generally favorable world economic conditions, they eventually emerged from peripheral status and achieved significant economic development during the 1980s and 1990s (Amsden et al., 1994; Appelbaum & Henderson, 1992; Cumings, 1997; Evans, 1995; World Bank, 1997).

# World-Systems Theory

World-systems theory builds on the concept of global commodity chains, worldwide networks of labor and production processes that extend from raw materials to the final consumer (Appelbaum & Christerson, 1997; Bair, 2009; Gereffi, 1995, 1996; Gereffi et al., 2011; Hopkins & Wallerstein, 1996). The globalization of production through commodity chains began to increase in the 1970s and accelerated throughout the late twentieth and early twenty-first centuries (see Chapter 14). The commodity chain approach emphasizes the increasingly globalized nature of production, as corporations based in high-income countries now outsource most of their manufacturing to independently owned contract factories in lower-income countries, in search of the lowest costs and

fewest environmental restrictions. As production goes global, lower-income countries compete with one another to get the factories. The most profitable part of the global commodity chain, typically headquartered in high-income countries, is made up of the brands that design the goods we all consume and the giant retailers that sell them. The least profitable part is found in low-income countries and includes many of the low-wage factories that actually produce the goods.

Apple, a giant global corporation whose wide variety of consumer electronic products source their components from 200 principal suppliers (Apple, 2022), provides an excellent example of how commodity chains work. Consider the iPhone 11 Pro Max, whose 2020 sales price ranged from $1,000 to $1,450, depending on storage capacity. This iPhone actually cost only $491 to manufacture, once the costs of all its components were added up. The most profitable part of its global commodity chain—design, creating brand identification, and marketing—was occupied by Apple, which is headquartered in Cupertino, located in California's famed Silicon Valley. Further down the commodity chain, where actual manufacturing occurs, the iPhone's most expensive component, the camera/image (costing $74 to make), was manufactured by the Korean corporation Samsung. The next most expensive item, the display/touchscreen (costing $67), was also mainly made by Samsung, although another Korean company, LG Display, also provided some screens. The numerous suppliers of its other components spanned the globe, requiring extremely tight coordination in order for Apple to meet its delivery goals. Although most people think of the iPhone as being made in China, what mainly occurs there is its final assembly (costing $21). This represents just 4 percent of its total cost, and only 1–2 percent of its retail price. Moreover, the factories that assemble iPhones in China—along with smartphones, tablets, computers, and other electronic gadgets for virtually all major consumer electronics corporations—are not even Chinese factories: They are owned by Foxconn, a global Taiwanese corporation that employs more than a million workers in China alone (Yang et al., 2019).

While the emergence of globalized commodity chains as a dominant form of manufacturing production has resulted in job loss in the United States, it has had the opposite effect in many of the countries where the jobs relocated. In East Asia, in particular, commodity chains provided a pathway to economic development. China, for example, began its

economic growth as the “world’s factory,” manufacturing everything from clothing and athletic shoes to the iPhone 11 Pro Max. Factory work in China is often dangerous and poorly paid; labor unions are controlled by the government, and workers have little choice but to suffer harsh conditions (Appelbaum & Lichtenstein, 2016). In one case that went viral in 2010, the pressure-cooker atmosphere endured by the workers, reinforced by the Chinese government, led despondent workers to leap from the upper floors of a giant Foxconn factory in south China; 14 workers lost their lives (Ngai et al., 2014). Yet at the same time, for many workers such manufacturing jobs have been the first rung on the economic ladder, preferable to the impoverished rural lives they left behind. And over several decades, Chinese factory workers became consumers, helping to drive China’s emerging economy. The Chinese government invested heavily in science and technology, and, as we have seen, the Chinese economy took off, raising hundreds of millions out of poverty (Appelbaum et al., 2018).

Immanuel Wallerstein, the founder of world-systems theory, drew on ideas from both dependency theory and global commodity chains (Hopkins & Wallerstein, 1996). In Wallerstein’s view, global commodity chains are best understood as containing core and peripheral activities that result in unequal and exploitative relations between countries. In our example, Apple’s highly profitable design and marketing activities are core, while final assembly in Foxconn factories is peripheral. Moreover, what constitutes a core or peripheral commodity chain activity can change over time: Manufacturing was a highly profitable core activity in the mid-twentieth century, enabling U.S. workers in unionized factories to achieve middle-class status. But when manufacturing moved to poor countries, it often became a peripheral activity, generating low wages and little profit. Wallerstein added a third category to dependency theory’s core and periphery: the semiperiphery. Semiperipheral countries are those that supply labor and raw materials to core industrial countries in the world economy, while at the same time profiting by extracting labor and raw materials from peripheral countries. Examples include Mexico in North America; Argentina, Brazil, and possibly Chile in South America; and some emerging economies of East Asia. The semiperiphery constitutes a kind of world middle class, and therefore offers the promise of economic growth to poorer countries in the periphery.

Wallerstein's world-systems theory sees the world capitalist economic system not merely as a collection of independent countries engaged in diplomatic and economic relations with one another, but rather as a single economic unit (Wallerstein, 1974a, 1974b, 1979, 1990, 1996, 2004). The ability of countries to move up, from periphery to semiperiphery or from semiperiphery to core, is severely limited, but it does sometimes happen. Many East Asian countries, for example, have moved from the periphery to the semiperiphery—and some regions of those countries, such as those containing their leading cities, increasingly resemble the core. China, as previously noted, in world-systems terms seems soon to join the core. The reasons for such successes are debated, but world-systems theory would attribute them, at least in part, to these countries' strong states. Unlike neoliberal theories, world-systems theory argues that strong governments do not necessarily interfere with economic development, but rather can be key in promoting it. Considerable research now suggests that in some regions, such as East Asia, successful economic development has been state led. Strong governments contributed in various ways to economic growth in the emerging economies of East Asia during the 1980s and 1990s (Amsden et al., 1994; Appelbaum & Henderson, 1992; Cumings, 1997; Evans, 1995; World Bank, 1997). More recently, the government of China has shown how massive public investment can propel a poor country into upper-middle-income status, raising, as we have seen, hundreds of millions of people out of rural poverty. The Chinese government has spent trillions of dollars on economic development, including national networks of high-speed highways and 200-mph trains, large-scale investments in science and technology, and entire new cities and science parks (Appelbaum et al., 2018).

Zhongguancun—a science park located in Beijing's Haidian District—is a major technological hub. It's home to 9,000 high-tech firms and serves as an example of China's investment in economic development.

Although the world system changes very slowly, once-powerful countries in the core eventually lose their economic power over others. According to world-systems theory, some five centuries ago the Italian city-states of Venice and Genoa dominated the world capitalist economy, but eventually they were superseded by the Dutch, who were then superseded by the British, who were then, in turn, superseded by the United States. Today, American dominance may be giving way to a more "multipolar" world where economic power will be shared among the United States, Europe, and Asia—or perhaps will yield to a rising China (Arrighi, 1994).

# The Theory of Global Capitalism

The emergence of giant transnational firms that operate in many countries and are loyal to none has given rise to a fourth theory, one that emphasizes the rising power of stateless corporations. The theory of global capitalism argues that a transnational capitalist class is

increasingly the major player in the global economy today, rather than the nationally oriented capitalists of major countries. According to this theory, we have entered a truly transnational phase of capitalism, characterized not only by global markets, production, and finance, but also by the emergence of a transnational capitalist class whose business concerns are global rather than national. The foremost proponent of this theory, sociologist William Robinson (2004, 2014, 2017, 2019), argues that global dominance is exercised no longer by states, but rather by the transnational capitalist class. According to Robinson's theory of global capitalism, the transnational capitalist class is more powerful than national capitalist classes; its global interests supersede any national loyalties. Its power is exerted in part through transnational organizations that oversee the global economy (for example, the World Trade Organization, the International Monetary Fund, and the World Bank) and promote global business interests.

What makes the transnational capitalist class transnational, according to Robinson? First, as previously noted, its *economic interests are global* rather than national: The firms it serves have global shareholders, workers, and markets, and provide goods and services that are sourced globally. Second, members of the transnational capitalist class share a *globalizing perspective*: They believe in neoliberalism and free trade and oppose efforts of governments to regulate their activities, arguing instead that they can be trusted to enforce corporate codes of conduct that call for responsible labor practices and environmental policies. Third, they share *similar lifestyles*: They send their children to the same (private) schools; they belong to exclusive clubs where they can play golf together and share business ideas; they have multiple homes in desirable areas around the world; they travel in private jets to their many homes, offices, and workplaces in different countries; and they attend global elite gatherings such as the annual World Economic Forum in Davos, Switzerland. Finally, they are *cosmopolitan*: Because of their similar lifestyles that span many countries, they see themselves as citizens of the world, rather than of any particular country.

Sociologist Leslie Sklair (2000) has divided the transnational capitalist class into four different (but overlapping) "class fractions": a *corporate fraction* that owns and controls the major transnational corporations; a *state fraction* composed of the bureaucrats and politicians who staff transnational organizations; a *technical fraction* consisting of the lawyers,

accountants, engineers, and other professionals who work for transnational corporations; and a *consumerist fraction* consisting of merchants, advertising and media professionals, and marketing specialists who sell the products. It is important to recognize that the transnational capitalist class operates not only in the economic sphere, but also in the political sphere (through its ability to shape national policies to better serve its global interests) and the cultural sphere (by fostering a global belief in the value of consumerism).

# Evaluating Theories of Global Inequality

Each of the four sets of theories of global inequality has strengths and weaknesses. Together, they enable us to better understand the causes and cures for global inequality.

1. **Neoliberal theories recommend the adoption of modern capitalist institutions to promote economic development.** They further argue that countries can develop economically only if they open their borders to trade, and they cite evidence to support this argument. But neoliberal theories overlook economic ties between poor countries and wealthy ones—ties that can impede economic growth under some conditions and enhance it under others. They blame low-income countries for their poverty rather than acknowledge outside factors, such as the business operations of more powerful nations. Neoliberal theories also ignore the ways government can work with the private sector to spur economic development. Finally, they fail to explain why some countries take off economically while others remain grounded in poverty and underdevelopment.
2. **Dependency theories emphasize how wealthy nations have exploited poor ones.** However, although these theories account for much of the economic poverty throughout the world, they cannot explain the occasional success stories, such as the rapidly expanding economies of China and East Asia. In fact, some formerly low-income countries have risen economically despite the presence of multinational corporations. Even some former colonies, such as Hong Kong and Singapore, are among the success stories.
3. **World-systems theory analyzes the world economy as a whole, looking at the complex global web of political and economic**

**relationships that influence development and inequality in poor and rich nations alike.** Building on the notion of global commodity chains as well as dependency theory, it is well suited to understanding the global economy at a time when businesses are increasingly free to set up operations anywhere, acquiring an economic importance rivaling that of many countries, and when strong states often play a role in fostering economic growth. One challenge faced by world-systems theory lies in the difficulty of modeling a complex and interdependent world economy. It also has been criticized for emphasizing economic and political forces at the expense of cultural ones, such as the combination of nationalism and religious belief that is currently reshaping the Middle East. Finally, world-systems theory has been said to place too much emphasis on the role of nation-states in a world economy increasingly shaped by transnational corporations that operate independently of national borders (Robinson, 2004; Sklair, 2000).

4. **The theory of global capitalism emphasizes the importance of an emerging and increasingly powerful transnational capitalist class, which is reshaping the world economy in its interests.** This class lacks national loyalty. Rather, its members see themselves as world citizens, sharing similar lifestyles, beliefs, and experiences. The theory of global capitalism argues that this class also dominates the global institutions that oversee and manage the world economy. The power of national capitalists, and the governments that serve their interests, has been severely weakened, as national capitalists are absorbed into the transnational capitalist class. One criticism of this approach is that it overemphasizes the economic and political power of global capitalism, pointing to the power of national business and non-business actors in such countries as China, which have developed a form of national capitalism in which the state plays a highly effective role. It also, like world-systems theory, downplays the ongoing importance of nationalism and religious belief in world politics.

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## CONCEPT CHECKS

1. **Describe the main assumptions of neoliberal theories of global inequality.**

2. **Why are dependency theories of global inequality often criticized?**
3. **Compare and contrast core, peripheral, and semiperipheral nations.**
4. **How do world-systems theory and the theory of global capitalism differ in their view of the role of individual countries in the global economic system?**

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**Table 9.1 APPLYING SOCIOLOGY TO GLOBAL INEQUALITY**

| THEORY | APPROACH TO UNDERSTANDING GLOBAL INEQUALITY | CONTEMPORARY APPLICATION |
|---|---|---|
| **Neoliberal theories** | Developing countries can improve their economies and lower inequality by opening their economies and markets to foreign investment, reducing the role of their governments, and adopting “Western” institutions and cultural values. | Modernization theory called for U.S. investment in Latin America under the 1960s Alliance for Progress; most recently, the International Monetary Fund and the World Bank have embraced free-market policies. |

| THEORY | APPROACH TO UNDERSTANDING GLOBAL INEQUALITY | CONTEMPORARY APPLICATION |
|---|---|---|
| **Dependency theories** | Inequality and poverty in low-income countries result from exploitation by rich countries; economic development can only occur if low-income countries control their own economies and—in extreme cases—engage in revolution. | Bangladesh's economy is dependent on apparel factories that make clothing for foreign brands such as H&M and Gap; the result is low pay, dangerous working conditions, and lack of funds to invest in Bangladesh's development. |
| **World-systems theory** | The world economic system is composed of core countries that extract wealth from poorer countries; a periphery that yields wealth to richer countries; and a semiperiphery that extracts wealth from the periphery and yields wealth to the core. Economic development requires a strong state that is committed to development. | The rapid economic growth of China, which has emerged as a world power in the twenty-first century, is evidence that a strong state dedicated to economic growth can be successful. |

| THEORY | APPROACH TO UNDERSTANDING GLOBAL INEQUALITY | CONTEMPORARY APPLICATION |
|---|---|---|
| **Theory of global capitalism** | Global economic domination by core countries has been replaced by the growing power of giant transnational corporations, which increasingly control the global economy and shape the policies of national governments. | Giant corporations such as Walmart now have more economic power than most countries, whose economies (and therefore politicians and businesspeople) are beholden to these corporations. |

# Glossary

neoliberalism
: The economic belief that free-market forces, achieved by minimizing government restrictions on business, provide the only route to economic growth.

modernization theory
: A version of neoliberal development theory that argues that low-income societies develop economically only if they give up their traditional ways and adopt modern economic institutions, technologies, and cultural values that emphasize savings and productive investment.

dependency theories
: Marxist theories of economic development that argue that the poverty of low-income countries stems directly from their exploitation by wealthy countries and by the multinational corporations that are based in wealthy countries.

core countries
: According to world-systems theory, the most advanced industrial countries, which take the lion's share of profits in the world economic system.

peripheral countries
: According to world-systems theory, countries that have a marginal role in the world economy and are thus dependent on the core countries for their trading relationships.

colonialism
: The process whereby Western nations established their rule in parts of the world away from their home territories.

dependent development
: The theory that poor countries can still develop economically, but only in ways shaped by their reliance on the wealthier countries.

global commodity chains
: Worldwide networks of labor and production processes that extend from raw materials to the final consumer.

semiperipheral countries
: According to world-systems theory, countries that supply sources of labor and raw materials to the core countries and the world economy while at the same time profiting by extracting labor and raw materials from peripheral countries, but are not themselves fully industrialized societies.

world-systems theory
: Pioneered by Immanuel Wallerstein, this theory emphasizes the interconnections among countries based on the expansion of a capitalist world economy. This economy is made up of core, semiperipheral, and peripheral countries.

global capitalism
: The current transnational phase of capitalism, characterized by global markets, production, and finance; a transnational capitalist class whose business concerns are global rather than national; and transnational systems of governance (such as the World Trade Organization) that promote global business interests.

transnational capitalist class
: A social class whose economic interests are global rather than national, who share a globalizing perspective and similar lifestyles, and who see themselves as cosmopolitan citizens of the world.

# 3 RESEARCH ON GLOBAL INEQUALITY TODAY

**Recognize the impact on people throughout the world of different economic standards of living, including one's health, diet, and educational opportunities.**

Wealth and poverty make life different in a host of ways. The United Nations Food and Agriculture Organization (UN FAO, 2022) estimates that as many as 828 million people, roughly one in nine people in the world, suffer from chronic hunger and that the vast majority of the hungry live in the Global South. More than half of the world's hungry are found in Asia and the Pacific; approximately one-quarter are in sub-Saharan Africa. In southern Asia alone, more than 330 million people are undernourished, representing 17 percent of the population; 23 percent of the population of sub-Saharan Africa is undernourished. Almost all of the world's hungry are illiterate, and many lack access to even primary school education. By mid-century, when the world population is projected to grow from its present level (roughly 7.7 billion) to nearly 9.7 billion people, there will be 2 billion more mouths to feed. By the next century, that number will increase to 3.2 billion more—with most of them in the poorest countries (UN Department of Economic and Social Affairs [DESA], 2022). And under worst-case projections—if birth rates defy projections and don't fall throughout the world—there may be as many as 13.2 billion people by the end of the century, an additional 5.5 billion people (UN DESA, 2017b). More than half of the world's population (55 percent) lived in urban areas in 2018, a figure that is predicted to increase to 68 percent by 2050, when an estimated 2.5 billion additional people will swell the world's cities. The overwhelming majority of this increase will be in Asia (especially China and India) and Africa (UN DESA, 2022). Giant cities in poorer countries bring with them their own problems: overcrowding, squalid slums, large homeless populations, and the need to supply fuel, food, and water over long distances.

Future population growth will have an enormous impact on global resources and the world ecosystem. We take up these issues in greater

detail in Chapter 19. Here we look at the differences between high- and low-income countries in terms of health, hunger, and education.

# Health

People in high-income countries are far healthier than their counterparts in low-income countries. Low-income countries generally suffer from inadequate health facilities, and the few hospitals or clinics seldom serve the poorest people. Residents of low-income countries also lack proper sanitation, drink polluted water, and risk contracting infectious diseases. They are more likely to suffer malnourishment, starvation, and famine (World Bank, 2019a). All of these factors contribute to physical weakness and poor health. Poor countries also often become dumping grounds for discarded consumer electronics and other toxic waste from high-income countries, and suffer environmental pollution from the factories that are manufacturing goods for high-income country corporations and consumers (see Chapter 19 for further discussion).

Because of such poor health conditions, people in low-income countries are more likely to die in infancy and less likely to live to old age than people in high-income countries. Children in low-income countries are 26 times more likely to die before they reach the age of five than children in high-income countries. Children often die of illnesses that are readily treated in wealthier countries, such as measles or diarrhea. People in low-income countries have an average life expectancy of 63 years, compared to 81 years in high-income countries. Still, conditions are improving somewhat. Over the 20-year period from 1998 to 2018, the child mortality rate dropped by nearly half, from 94 (per 1,000 live births) to 48 in low-income countries (World Bank, 2020e). In addition, over the same period average life expectancy at birth increased from 53 to 63 as a result of the wider availability of modern medical technology, improved sanitation, and rising incomes.

One interesting caveat is that in the United States and other countries, illnesses that had been all but eradicated are starting to resurface, due in large part to the fact that many parents are electing not to immunize their children over fears of a link between immunization and autism—a fear most scientific researchers believe is unfounded. Immunization rates in the United States have declined slightly in recent years, and outbreaks of

whooping cough and measles in other countries are believed to have resulted from people who refused vaccines (Hviid et al., 2019; DeStefano & Shimabukuro, 2019; National Institutes of Health, 2019). This is especially concerning in a highly globalized world, where people with communicable illnesses can easily cross borders. Over the past decade, a number of measles outbreaks have spread throughout Western Europe among unvaccinated populations (World Health Organization [WHO], 2019c).

One chilling example of the relationship between global poverty and disease is the Ebola epidemic that broke out in West Africa in 2014. Ebola—also called hemorrhagic fever because one of its symptoms is internal and external bleeding—is a deadly disease that is spread through contact with the blood or bodily fluids of infected persons who are showing symptoms. Because transmission requires direct physical contact, treatment requires that patients be isolated, and caregivers wear protective suits that cover their entire bodies. When Ebola victims are not completely quarantined, the disease can spread exponentially: One infected person can infect all who come in close bodily contact (such as family members who are unaware of the seriousness of the disease), and they, in turn, can infect everyone with whom they have physical contact. According to the U.S. Centers for Disease Control and Prevention (2016), this was the largest outbreak of Ebola in history; two of every five people who contracted the disease died. By the end of 2016, two years after Ebola first broke out in Liberia, Sierra Leone, and Guinea, nearly 29,000 cases had been reported in those countries and more than 11,000 people had died. The illness spread rapidly partly because it was new to this region of Africa and therefore went unrecognized. Caregivers, from family members to professional health workers, initially believed it to be malaria or some other disease transmitted by mosquitoes rather than human contact. It is worth noting that in another poor African country, the Democratic Republic of Congo, the disease was quickly recognized because it had broken out several times before; health care workers moved quickly to contain it, with the result that only 50 people died. Ebola also spread rapidly in West Africa because there were no health care facilities capable of dealing with the large and growing number of Ebola patients, facilities that required patients to be completely isolated and treated by trained medical personnel wearing special (and costly) protective suits.

Many victims lived in remote rural areas that lacked usable roads or other infrastructure, making it difficult to identify, isolate, and treat them; when they flooded into crowded cities in search of treatment, the disease quickly spread. The borders between Liberia, Sierra Leone, and Guinea, drawn by colonial powers in the nineteenth century, are in many places open. Today, people freely cross them, making containment of the disease difficult. And years of war and corrupt governments in this region meant that a concerted state-led response was unlikely (Fox, 2014). As a result, during the first months of the outbreak, as many as three-quarters of infected victims died. When Ebola is diagnosed early and treated adequately, even in impoverished areas of West Africa, some two-thirds survive (National Public Radio, 2014). Of the first 10 Ebola patients treated in the United States, most of whom were health care workers who had contracted the disease while treating patients in West Africa, 8 recovered—this 80 percent recovery rate reflects what can be accomplished with modern health care facilities (*New York Times*, 2014).

Medical staff at the Brooklyn Hospital Center in New York treat one of many patients in a Covid-19 ward.

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When the deadly coronavirus broke out in the Chinese city of Wuhan at the end of December 2019, Chinese officials quarantined the city of 11 million people, imposed severe travel restrictions within China, and cooperated with the World Health Organization to stem its spread elsewhere. Yet at the same time, while the Ebola epidemic was largely

isolated within remote African villages, the coronavirus spread far more readily to other countries: Wuhan is a cosmopolitan Chinese center of industry and commerce, and by the time the disease was identified and restrictive measures were put in place, unknowingly infected persons had traveled elsewhere in China as well as to other countries. By August 2020, only eight months after the disease was first identified, the World Health Organization reported that the disease had spread to nearly every country in the world, resulting in nearly 126 million confirmed cases and 640,000 deaths—and both numbers rapidly increased. The United States alone, by September 2020, had accounted for over 6 million confirmed cases and 200,000 deaths (WHO, 2020e). The coronavirus also shuttered businesses around the world, as concerns over widespread contagion and massive numbers of deaths led many countries to adopt strict measures limiting or even prohibiting most retail activities. This, in turn, disrupted global supply chains, as factories around the world—themselves often sites of the pandemic—lost their customers. The result of today's highly interconnected world was therefore not only the global spread of a deadly disease but the deepest global recession since World War II (World Bank, 2020f).

# Hunger and Malnutrition

Hunger and malnutrition are major global sources of poor health. Problems of inadequate food are nothing new. What seems to be new is their pervasiveness—the fact that so many people in the world today are on the brink of starvation (Global Map 9.2). As previously noted, the United Nations Food and Agriculture Organization (FAO) estimates that as many as 828 million people worldwide, or roughly one in nine, are chronically undernourished, virtually all of them in the Global South. FAO defines undernourishment as a diet of 1,800 calories or less a day, the minimal number of calories (on average) required to provide adults with the nutrients needed for active, healthy lives. (Of course, what is eaten is also a key determinant of health; one can have a high-calorie diet that lacks the required nutrients for good health.) While the number of chronically undernourished people had declined to 572 million people in 2014, the number has since increased by 300 million people (UN FAO, 2022).

Most hunger today is the result of a combination of natural and social forces. As of March 2023, FAO has listed 45 countries in Africa, the Middle East, Central and South Asia, the Pacific, and the Caribbean as in need of external food assistance due to severe weather- and conflict-related food shortages. In 21 of these countries, conflict is the major problem: In Syria, for example, a long and violent civil war has left 85 percent of the population in poverty; 12 million people are "acutely food insecure" and in need of urgent assistance (UN FAO, 2023). Moreover, conditions are predicted to worsen considerably as a result of global climate change, which will significantly affect agricultural production, especially in the world's poorest countries. Absent a concerted effort by all countries to limit greenhouse gas production, the worst-case scenario estimate is that an additional 165 million people would be plunged into extreme poverty by 2030 (UN FAO, 2016).

The countries affected by malnutrition are too poor to pay for new technologies that would increase food production. Nor can they afford sufficient food imports. As world hunger grows, the largest increases in food production occur where hunger is not a pervasive problem, while the poorest countries—those most in need of food—suffer from the lowest food production gains (Bjerga, 2017). In much of Africa, for example, food production per person has declined. Surplus food produced in high-income countries such as the United States is seldom affordable to the countries that need it most.

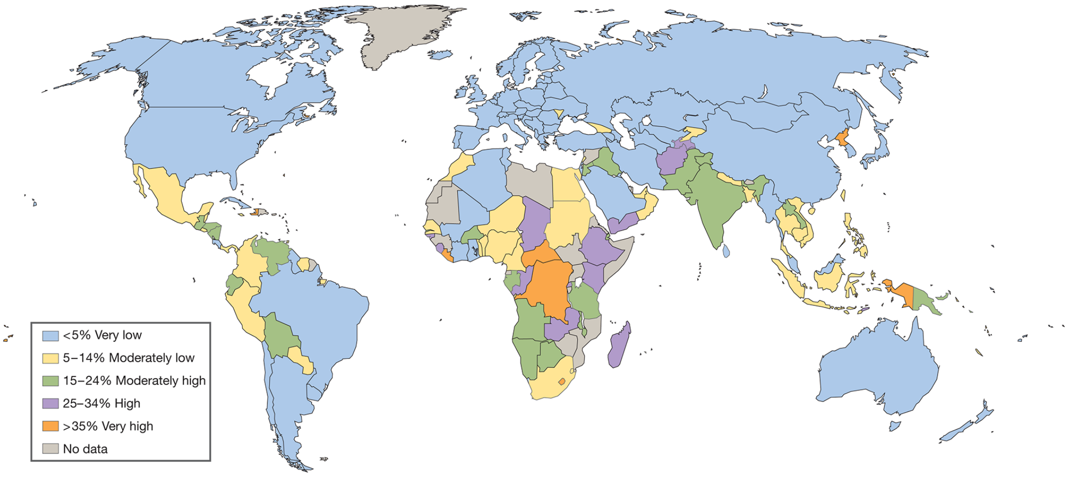
The HIV/AIDS epidemic has also contributed to food shortages and hunger, killing many working-age adults. There is evidence that the high rates of HIV infection in many African countries reflect the weakened health of impoverished people, especially children. UNAIDS estimates that since the beginning of the epidemic, some 84.2 million people around the world have been infected and 40 million have died. Roughly 38 million people are currently living with HIV/AIDS, the majority in sub-Saharan Africa. Two-thirds of new HIV infections occur in sub-Saharan Africa. Still, as devastating as HIV/AIDS can be, there is good news as well. Better understanding of the causes and prevention of the disease, along with the development of antiviral medications that enable people to live with the infection, has reduced both the incidence of new cases and the number of deaths among HIV-positive people. Globally, new HIV infections have fallen by 52 percent since 2010, and the number

of AIDS-related deaths has dropped by 68 percent since the disease's peak in 2005 (UNAIDS, 2022).

Global Map 9.2

**HUNGER IS A GLOBAL PROBLEM**

Hunger is a global problem, although it is disproportionately found in the poorest regions of the world. It is estimated that as many as 828 million people worldwide are chronically undernourished, the vast majority of whom are in developing countries. In sub-Saharan Africa, which suffers from the highest rates of undernourishment, almost one in four people is hungry.




Source: UN FAO, 2022.

# Education and Literacy

Education and literacy are important routes to economic development. Lower-income countries are therefore disadvantaged because they lack high-quality public education systems. Children in high-income countries get more schooling, and adults in those countries are more likely to be literate. While virtually all high school–age males and females attend secondary school in high-income countries, in 2018 only 60 percent in lower-middle-income countries did so, and only 34 percent in low-income countries. In low-income countries, only 71 percent of males over 15 and 56 percent of females over 15 are able to read and write. The adult

literacy rate in high-income countries, by way of comparison, is nearly 100 percent (World Bank, 2019a). One reason for these differences is that high-income countries spend a much larger percentage of their national income on education than low-income countries do, in large part because they can afford to do so.

Education is important for several reasons. First, it contributes to economic growth, because people with advanced schooling provide the skilled workforce necessary for high-wage industries. Second, education may offer some hope for escaping the cycle of harsh working conditions and poverty, although if there are no jobs to be had, even highly educated people may join the ranks of the poor and unemployed. Finally, educated people usually have fewer children, thereby slowing the global population explosion that contributes to global poverty (see Chapter 19).

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### CONCEPT CHECKS

1. **Why do people who live in high-income countries have better health than those who live in low-income countries?**
2. **Name two causes of hunger in the world today.**
3. **Why are literacy rates so much higher in high-income countries than in low-income countries?**

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# 4 UNANSWERED QUESTIONS

**Understand the causes of inequality—both between countries and within countries—in the world today. Learn who makes up the global poor and whether the proportion of the population living in poverty is increasing or decreasing. Consider how globalization might shape global inequality in the future.**

Since the mid-1970s, the overall standard of living in the world has generally risen. Illiteracy is down, infant deaths and malnutrition are less common, people are living longer, and average income is higher. Does this higher standard of living mean that global poverty is being eliminated, or that inequality within nations—or, for that matter, between nations—is declining? What is the future of inequality in our rapidly globalizing world?

There are no clear-cut answers to any of these questions, perhaps because during a time of rapid change, it is difficult to assess accurately the social forces at play, even with the tools of social science. The debates, however, are informative and have produced some useful explanations, even if agreement is lacking.

## What Are the Causes of Inequality in the World Today?

Sociologists Roberto Patricio Korzeniewicz and Timothy Patrick Moran, in their book *Unveiling Inequality* (2012), provide a new and imaginative approach to answer an old question: What are the underlying causes of persistent inequality in the world today? Drawing on a world-systems approach, they analyze inequality between and within countries. By using statistical techniques for estimating inequality—including the Gini index, which measures the extent to which the distribution of income deviates from a perfectly equal distribution—they examine both forms of inequality over the past two centuries.

With regard to inequality within countries, Korzeniewicz and Moran show that many countries have been trapped for decades (some for centuries) in a vicious cycle of persistently high levels of inequality, while others enjoy a virtuous cycle resulting in long-term low levels of inequality. One reason some countries are trapped in a cycle of long-term inequality is the central role played by discrimination on the basis of race, ethnicity, and nationality, which systematically excludes people from economic, social, and political opportunity. Slavery and the legacies of colonialism are key examples.

With regard to inequality between countries, Korzeniewicz and Moran find that inequality has increased since the nineteenth century, which suggests that the global system itself is trapped in a vicious cycle of self-perpetuating inequality. Even though some countries move up—Japan, China, and the emerging economies of East Asia—high levels of inequality persist. Although Korzeniewicz and Moran do acknowledge that global inequality has actually declined somewhat during the past decade or so, they attribute this drop primarily to the economic rise of China.

A main reason for the persistence of inequality between countries, Korzeniewicz and Moran argue, is that the high-income countries in the world economy have been very effective in developing institutions that assure they remain on top. One such institution is restricting the ability of people from low-income countries to immigrate. While capital can move freely across borders, people cannot. The result is that poor people are largely trapped in poor countries, reinforcing the cycle of poverty in those countries. They conclude that a more open global migration system would help reduce inequality between countries.

While *Unveiling Inequality* provides an important explanation for the persistence of long-term inequalities both within and between countries, it arguably overstates the inevitability of long-term inequality in the global system. As global corporations move into lower-income countries in search of low-cost production, they provide jobs for millions of people. As we have seen, these jobs often entail terrible conditions. Yet, in some cases, they have lifted many people into middle-class status. In East Asia and China, this has enabled entire economies to move up in the global stratification system.

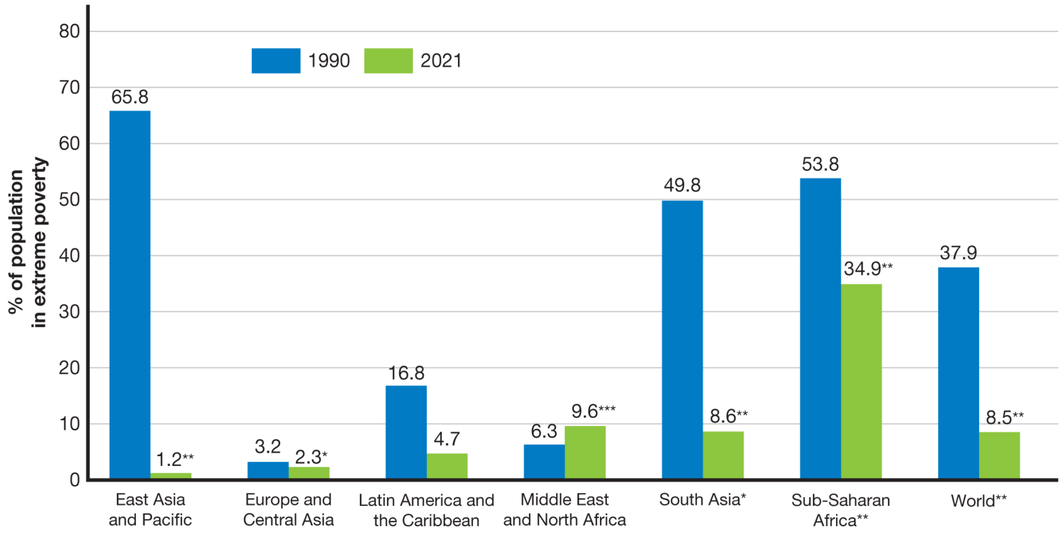
The question remains: Whatever the lessons of the past, will the forces reshaping the world economy today increase inequality within and between countries—or do they represent a new dynamic that, in the long run, will result in some form of global economic convergence?

# Is Global Poverty Increasing or Decreasing?

Before we turn to the question of whether global poverty is increasing or decreasing, let's first consider a different question: Who are the global poor? The World Bank (2022n) defines extreme poverty as living on less than $2.15 a day. Four out of five of the world's poor live in rural areas; nearly two-thirds work in agriculture. Roughly two out of five are 14 or younger and lack formal education. Over half (60 percent) of the global poor live in sub-Saharan Africa, while a third live in South Asia (World Bank, 2022d).

Figure 9.2

**EXTREME POVERTY BY REGION, 1990 AND 2021**




*Data only extends to 2020

**Data only extends to 2019

***Data only extends to 2018

Source: World Bank, 2021c.

The number of people living in extreme poverty is declining. According to the World Bank, 734 million people, about 10 percent of the world's population, lived in extreme poverty in 2015; in 1993, the number was nearly two and a half times that amount, 1.8 billion people or roughly 34 percent of the world population at that time. This means that since 1993, more than 1.1 billion people have escaped extreme poverty (World Bank, 2019a). But these positive trends mask some disturbing differences between regions and countries (see Figure 9.2). Sub-Saharan Africa, the poorest region in the world, did experience a slight decline in the percentage living in extreme poverty, from 47 percent in 2010 to 42 percent in 2015. Because of overall population growth, however, the number of extremely poor people actually increased, from 394 million to 408 million, during the same period (World Bank, 2020h).

Hong Kong (pictured above), along with Taiwan, South Korea, and Singapore, has become one of the most rapidly growing economies on earth.

In fact, a good part of the global reduction in extreme poverty can be attributed to a single region: East Asia and the Pacific. The dynamic economic growth of that region has reduced its extreme poverty rate from 81 percent in 1981 to 2 percent in 2015. And within that region, because of its giant size, China alone has accounted for the lion's share of the global reduction in the number of extremely poor people. Between 1981 and 2015 (the most recent year for which the World Bank has Chinese poverty data), the number of Chinese subsisting on less than $1.90 a day

declined from 800 million to 10 million (World Bank, 2019a). China's economic boom has lifted hundreds of millions of people out of extreme poverty in the past 30 or so years—roughly the same number as for the world as a whole, where declines in extreme poverty in East Asia, Europe, and Latin America have been more than offset by increases in the Middle East, Africa, and South Asia.

# What About Inequality Within Countries?

As we noted earlier in this chapter, export-oriented industrialization—the relocation of industrial manufacturing from high-wage to lower-wage countries—has enabled some of the latter to industrialize, resulting in their economic growth. This "rise of the rest" (Zakaria, 2009) has lowered the economic gap between high-income and middle-income countries, reducing global inequality, at least among those middle-income countries that have been able to benefit from these changes. This process began with Japan in the 1950s, but it quickly extended to what were called the newly industrializing economies (NIEs) in East Asia. Today, the more widely used term is emerging economies, or the rapidly growing economies of the world, particularly in East Asia but also in Latin America. The East Asian emerging economies included Hong Kong in the 1960s and Singapore, South Korea, and Taiwan in the 1970s and 1980s. Other Asian countries followed in the 1980s and the early 1990s, most notably China, but also Indonesia, Malaysia, and Thailand. Today, most of these countries are in the middle-income category, and some—such as Hong Kong, Singapore, South Korea, and Taiwan—have reached the high-income category.

China, the world's most populous country, has one of the most rapidly growing economies on the planet. At an average annual compound growth rate of 12 percent between 1980 and 2010 (World Bank, 2020b), the Chinese economy more than doubled, and is today the world's second-largest economy behind the United States, having surpassed Japan in 2010. Although China's rate of growth has slowed in the last few years (and plummeted in 2020, as a result of the Covid-19 pandemic), China remains the premier example of how export-oriented industrialization can reduce inequality between wealthy and once-poor nations.

Within countries, however, the story is somewhat different. Among high-income countries, inequality generally declined during much of the twentieth century, as policies were adopted (such as progressive income taxes, retirement systems, health care, and social welfare programs) that enabled a growing number of citizens to enjoy the fruits of expanding economies. But beginning in the 1970s, when the globalization of manufacturing began to take off, inequality once again began to increase in high-income countries.

One measure, the share of total national income going to the richest 1 percent of the population, suggests that at least in the United States, the level of inequality, which declined until the 1960s, has returned to what it was a century ago (Roser & Ortiz-Ospina, 2017). In 1913, the top 1 percent of U.S. households accounted for 18 percent of total U.S. income. By the 1960s, that share had dropped by more than half, to only about 9 percent; today, it has rebounded to higher levels than a century ago (22 percent in 2015). The pattern in the share going to the top tenth of 1 percent (the superrich) has been even more dramatic: It dropped from nearly 9 percent to 2 percent by the 1970s, but by 2018 it had grown to 11 percent, more than a five-fold increase (Inequality.org, 2020).

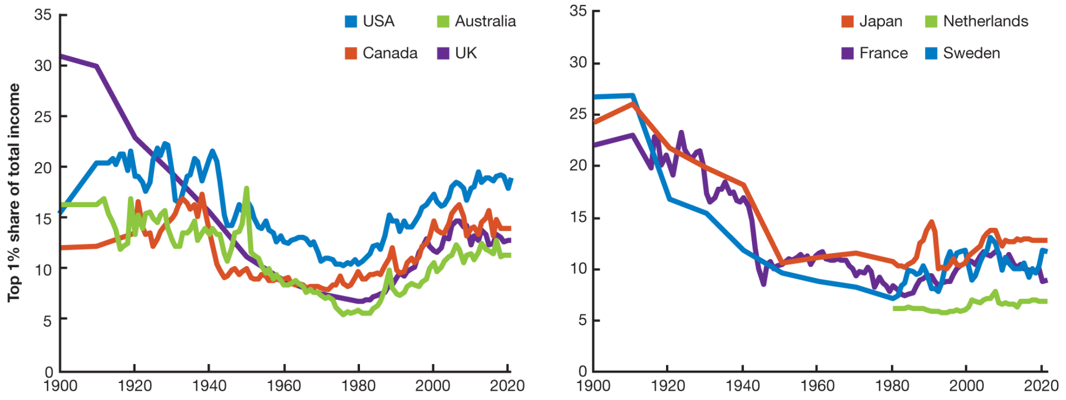
Although the growth of inequality in the United States is extreme among high-income countries, Britain and Canada have experienced similar patterns (**Figure 9.3**). In Europe, the pattern is different: While there has been a slight uptick in inequality since the 1970s, levels of inequality do not approach what they were a century ago. There are many reasons for this pattern, one of which is that the United States, Britain, and even Canada have pursued economic policies that are far more neoliberal than those of most European countries. As a result, the impact of globalization has been more severe.

# What Does Rapid Globalization Mean for the Future of Global Inequality?

Today, the social and economic forces leading to a single global capitalist economy appear to be irreversible. State-driven socialism, which was the principal challenge to this outcome, came to an end with the collapse of the Soviet Union in 1991.

Figure 9.3

**SHARE OF TOTAL INCOME GOING TO THE TOP 1%, 1900–2021**




*Inequality within some high-income countries has followed a U-shaped pattern over the past century, declining sharply until the 1960s and 1970s, then increasing, partly as a result of globalization. But other factors, such as national economic policies, are also important. Contrast the United States with European countries such as France and the Netherlands, as well as Japan, where national policies have muted the impact of globalization.*

Source: World Inequality Database, 2021.

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Many future scenarios are possible. In one, our world might be dominated by large global corporations, with falling wages for many people in high-income countries and rising wages for a few in low-income countries (see again Robinson, 2004, 2014, 2019; Sklair, 2000). Average income worldwide might level out, although at a level much lower than that currently enjoyed in the United States and other industrialized nations. In this scenario, the polarization between the haves and the have-nots within countries would grow, as the whole world would be divided into those who benefit from the global economy and those who do not. Such polarization could fuel conflict between ethnic groups, and even between nations, if those suffering from economic globalization blame others for their plight.

In another, more hopeful scenario, a global economy could mean greater opportunity for everyone as the benefits of modern technology stimulate

worldwide economic growth. The republics of the former Soviet Union and the formerly socialist countries of Eastern Europe will eventually become high-income countries. Economic growth will spread to Latin America, Africa, and the rest of the world. Because capitalism requires that workers be mobile, the remaining caste societies will be replaced by class-based societies, which will experience enhanced opportunities for upward mobility. Indeed, the most successful countries in Asia and South America might be a sign of things to come. China and India, the world's two most populous countries, together have middle-class populations totaling as many as several hundred million people, while Brazil, the world's fifth most populous country, is also growing rapidly. Of course, the global environmental impacts of such a scenario could be catastrophic (see Chapter 19).

In June 2016, British voters approved a referendum, known as Brexit, to leave the EU. Britain formally left the EU on February 1, 2020.

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What is the future of global inequality? It is difficult to be entirely optimistic. Global economic growth has slowed, and while environmental challenges resulting from global warming will affect all countries, the poorest countries will be the hardest hit. The Russian economy, in its move from state-driven socialism to capitalism, has encountered many pitfalls, leaving many Russians poorer than ever. The European Union

(EU), once thought to be a pillar of the global economy, is facing numerous challenges. While many countries have experienced economic growth, many have not; the gap between rich and poor remains large—and within many countries, this gap is growing.

The world is experiencing a significant pushback against what many see as the destructive effects of globalization. In June 2016, British voters narrowly approved "Brexit," a referendum on leaving the EU. Although it took an additional three years of often contentious parliamentary debate to decide how best to manage this radical change (or, indeed, whether to rethink leaving entirely), Britain and the EU officially parted company on February 1, 2020. The decision to leave the EU was driven in large part by concerns among many working- and middle-class voters that EU membership was hurting them economically, opening Britain's borders to immigrants who were seen as competing for jobs and, for some voters, as culturally "different" and therefore threatening. The EU, whose 27 members make it the world's third-largest economy (after the United States and China), had been widely regarded as a reasonably successful example of globalization—a trading bloc whose open borders permitted businesses and workers alike to move freely for mutual benefit.

Brexit was but one example of how globalization is being challenged throughout the world. In countries as diverse as Turkey, China, Russia, India, Hungary, Poland, the Philippines, and even the United States, populist leaders have emerged whose appeal is strongest among those who believe they have been damaged by globalization. The emergence of far-right nationalist parties throughout Europe, many of which have achieved electoral success in recent years, suggests that Britain may not be the only country to consider such an action.

A survey of nearly 50,000 respondents in 44 countries found significant differences in the perceived benefits of trade between those who lived in advanced economies and those who lived in developing ones. When asked whether or not trade creates jobs, only 20 percent of respondents in the United States answered yes, while 50 percent believed that trade destroyed jobs. Among respondents in all advanced economies, only 44 percent believed trade created jobs, in comparison with 66 percent of those in developing economies (Pew Research Center, 2014a). There is clearly a widely shared belief that globalization has shifted jobs from more economically developed (higher-wage) countries to less economically developed (lower-wage) ones, with growing inequality one

result. But are such perceptions correct? Is globalization the principal cause of job loss and growing inequality in the United States?

A growing body of research suggests that the answer to this question is no. One highly cited study found that even though the demand for goods manufactured in the United States has increased in recent years, the number of workers required to produce those goods has plummeted, the result of technological changes that have greatly increased worker productivity. By analyzing employment, trade, and productivity in all U.S. manufacturing jobs over the first decade of the twenty-first century, the study concluded that 88 percent of 6.5 million lost manufacturing jobs resulted from productivity increases rather than globalization. Thanks to technological advances, it simply takes fewer workers to manufacture the goods we all consume (Hicks & Devaraj, 2015).

Robotics—machines powered by information technology and artificial intelligence—are beginning to revolutionize production in the United States and around the globe. While China is often faulted for "stealing" American jobs, most of the U.S. jobs that have disappeared are now being performed digitally, from electronic cash registers that scan your purchases to automobile factories where huge computer-driven robotic arms perform welding and assembly. Three-dimensional printing, visual and voice recognition, and advances in information technology are rapidly claiming jobs that once led to a middle-class lifestyle; growing inequality is one result (Brynjolfsson & McAfee, 2014).

Nor is this process limited to advanced industrial countries like the United States, where workers once enjoyed relatively high wages. China's giant Foxconn factories, where worker suicides created a public outcry, are beginning to replace human labor with robots as well. In 2015, Foxconn CEO Terry Gou announced plans to introduce a million robots (dubbed "Foxbots"), replacing workers who engage in such tasks as spraying, welding, and assembling. Some 60,000 workers had reportedly been replaced by 2016 (Wakefield, 2016). Gou himself was heard to comment, on a visit to a zoo in Taiwan, that Foxconn "has a workforce of over one million worldwide, and as human beings are also animals, to manage one million animals gives me a headache" (reported in Kwong, 2012). Robots require less management than human workers, and they are not prone to committing suicide when overworked. Even in China, where wages are still far below wages in the United States, machines now perform many routine operations more cheaply than people could.

The pushback against globalization will not slow the technological revolution that is reshaping work and contributing to inequality. The future of global inequality remains an open question—one whose answer will depend, in large part, on whether globalization can be managed more equitably, and whether new jobs can be found for those displaced by technological innovation.

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**CONCEPT CHECKS**

1. **To what extent is the pushback against globalization likely to solve the problem of growing inequality?**
2. **How have technology and globalization contributed to deepening existing global inequalities?**

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# Glossary

emerging economies
: Countries located primarily in the Global South, such as India and Singapore, that over the past three to four decades have begun to develop a strong industrial base.

# THE BIG PICTURE

# Chapter 9

## Global Inequality

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**Exercises:** Thinking Sociologically

1. Summarize the four types of theories that explain why there are gaps between nations' economic development and resulting global inequality: neoliberal theories, dependency theories, world-systems theory, and global commodity chains theories. Briefly discuss the distinctive characteristics of each type of theory and how it differs from the others. Which theory do you feel best explains economic developmental gaps?
2. This chapter states that global economic inequality has personal relevance and importance to people in advanced, affluent economies. Briefly review this argument. Explain whether you were persuaded by it, or not.

# BASIC CONCEPTS p. 294

## Learning Objectives

Understand the differences in wealth and power between countries.

### Terms to Know

globalization • global inequality • GNI • absolute poverty • relative poverty • Capabilities Approach

### Concept Checks

1. Explain how the World Bank measures global inequality, and discuss some of the problems associated with measuring inequality.
2. Compare and contrast high-income, middle-income, and low-income countries.
3. What is the Capabilities Approach to measuring well-being, and how does it provide a more sociological un derstanding of development than purely economic measures?

## THEORIES OF GLOBAL INEQUALITY p. 301

### Learning Objectives

Learn several sociological theories for why some societies are wealthier than others, and understand the strengths and weaknesses of each.

### Terms to Know

neoliberalism • modernization theory • dependency theories • core countries • peripheral countries • colonialism • dependent development • global commodity chains • semiperipheral countries • world-systems theory • global capitalism • transnational capitalist class

### Concept Checks

1. Describe the main assumptions of neoliberal theories of global inequality.

2. Why are dependency theories of global inequality often criticized?
3. Compare and contrast core, peripheral, and semiperipheral nations.
4. How do world-systems theory and the theory of global capitalism differ in their view of the role of individual countries in the global economic system?

# RESEARCH ON GLOBAL INEQUALITY TODAY p. 312

## Learning Objectives

Recognize the impact on people throughout the world of different economic standards of living, including one's health, diet, and educational opportunities.

## Concept Checks

1. Why do people who live in high-income countries have better health than those who live in low-income countries?
2. Name two causes of hunger in the world today.
3. Why are literacy rates so much higher in high-income countries than in low-income countries?

# UNANSWERED QUESTIONS p. 318

## Learning Objectives

Understand the causes of inequality—both between countries and within countries—in the world today. Learn who makes up the global poor and whether the proportion of the population living in poverty is increasing or decreasing. Consider how globalization might shape global inequality in the future.

## Terms to Know

emerging economies

## Concept Checks

1. To what extent is the pushback against globalization likely to solve the problem of growing inequality?
2. How have technology and globalization contributed to deepening existing global inequalities?

# Glossary

globalization
: The development of social and economic relationships stretching worldwide. In current times, we are all influenced by organizations and social networks located thousands of miles away. A key part of the study of globalization is the emergence of a world system—for some purposes, we need to regard the world as forming a single social order.

global inequality
: The systematic differences in wealth and power between countries.

GNI
: Gross national income, a commonly used measure based on total income earned as a result of a country's yearly output of goods and services, including income earned abroad.

absolute poverty
: A state of poverty in which one lacks the minimal requirements necessary to sustain a healthy existence.

relative poverty
: Poverty defined according to the living standards of the majority in any given society.

Capabilities Approach
: An approach to economic development that uses social indicators to emphasize the degree to which people are capable of achieving a life they value, given the opportunities they face.

neoliberalism
: The economic belief that free-market forces, achieved by minimizing government restrictions on business, provide the only route to economic growth.

modernization theory

A version of neoliberal development theory that argues that low-income societies develop economically only if they give up their traditional ways and adopt modern economic institutions, technologies, and cultural values that emphasize savings and productive investment.

dependency theories

Marxist theories of economic development that argue that the poverty of low-income countries stems directly from their exploitation by wealthy countries and by the multinational corporations that are based in wealthy countries.

core countries

According to world-systems theory, the most advanced industrial countries, which take the lion's share of profits in the world economic system.

peripheral countries

According to world-systems theory, countries that have a marginal role in the world economy and are thus dependent on the core countries for their trading relationships.

colonialism

The process whereby Western nations established their rule in parts of the world away from their home territories.

dependent development

The theory that poor countries can still develop economically, but only in ways shaped by their reliance on the wealthier countries.

global commodity chains

Worldwide networks of labor and production processes that extend from raw materials to the final consumer.

semiperipheral countries

According to world-systems theory, countries that supply sources of labor and raw materials to the core countries and the world economy while at the same time profiting by extracting labor and raw materials from peripheral countries, but are not themselves fully industrialized societies.

world-systems theory

Pioneered by Immanuel Wallerstein, this theory emphasizes the interconnections among countries based on the expansion of a capitalist world economy. This economy is made up of core, semiperipheral, and peripheral countries.

global capitalism

The current transnational phase of capitalism, characterized by global markets, production, and finance; a transnational capitalist class whose business concerns are global rather than national; and transnational systems of governance (such as the World Trade Organization) that promote global business interests.

transnational capitalist class

A social class whose economic interests are global rather than national, who share a globalizing perspective and similar lifestyles, and who see themselves as cosmopolitan citizens of the world.

emerging economies

Countries located primarily in the Global South, such as India and Singapore, that over the past three to four decades have begun to develop a strong industrial base.

# 10 Inequality on the Basis of Gender and Sexuality

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In 2023, what proportion of all members of the U.S. Congress were women?

1. **10 percent**
2. **30 percent**

3. **50 percent**
4. **70 percent**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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**LEARNING OBJECTIVES**

1. **Basic Concepts** Understand the ways that gender differences reflect biological factors, sociocultural influences, and the complex interplay between the two. Understand the distinctions between sex, gender, gender identity, and sexual orientation.
2. **Sociological Theories of Gender Inequalities** Recognize and contrast competing explanations for gender inequality. Learn some feminist theories about gender equality.
3. **Research on Gender Today: Documenting and Understanding Gender Inequalities** Learn how social structure creates and maintains inequalities on the basis of gender, gender identity, and sexual orientation. Understand how gender is cast as a binary in society and how that contributes to inequality. Learn the forms these inequalities take in social institutions such as the workplace, families, the educational system, and the political system in the United States and globally.
4. **Unanswered Questions: Why Do Gender Inequalities Persist?** Understand how sex segregation contributes to the gender gap in pay, learn about family-leave policies in other countries, explore the effects of gender inequality on cisgender and transgender men, and evaluate the competing explanations for the persistence of gender-based violence.

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Most of us know that far fewer women than men hold leadership positions in politics and business today, yet we also know that women have made tremendous strides in politics, education, and the workplace over the past century. Kamala Harris made history in 2020 when she became the first woman to be elected vice president of the United States. The daughter of an Indian mother and Jamaican father, she is also the first woman of color to ascend to the second-highest elected office in the United States. Women also have made tremendous strides in academia. In 2023, a record six out of eight Ivy League universities were led by women presidents: Sian Leah Beilock (Dartmouth College), Claudine

Gay (Harvard University), M. Elizabeth Magill (University of Pennsylvania), Christina Paxson (Brown University), Martha Pollack (Cornell University), and Nemat “Minouche” Shafik (Columbia University) (Commodore, 2023).

Given these highly visible accomplishments of women, we might think that at least 50 percent (answer *c*) or 70 percent (answer *d*) is the correct answer to the quiz at the start of this chapter. Yet, according to the Center for American Women and Politics (2023a), a research organization at Rutgers University that tracks elected officeholders in the United States, just 28 percent of the 535 elected members of the U.S. Congress in 2023 were women (answer *b*). Although this number may appear small, it is a record high in the history of Congress. One-quarter (25 percent) of the 100 seats in the Senate are filled by women, whereas 28.7 percent of the 435 seats in the House of Representatives are held by women.

Women’s progress in business is even slower. Women held the top position of CEO in just 10 percent of all Fortune 500 companies in 2023, despite accounting for 47 percent of the total labor force (Hinchliffe, 2023). Why do so few women hold leadership positions in politics and business, despite some historic achievements in recent decades? Few would point to outright discrimination as the culprit, yet most experts say that discrimination often takes place in more subtle and hard-to-prove ways. Running for national office requires having the professional connections and deep financial pockets to pay for or raise funds for extraordinarily costly political campaigns (Sanbonmatsu, 2020). Climbing to the top-tier positions at competitive Wall Street and Silicon Valley firms requires round-the-clock work along with traits associated with cisgender heterosexual men like aggressiveness and even ruthlessness. According to Ilene Lang, president of Catalyst, a research organization focused on gender and work, these traits are at odds with traditional gender role socialization—“it is behavior that’s admired in men but despised in women” (Torregrosa, 2012). Others point to lack of female mentors in corporate upper echelons, especially for women of color. For instance, just two Fortune 500 CEOs today are Black women: Rosalind Brewer, of Walgreens Boots Alliance, and Thasunda Brown Duckett, of TIAA.

Another explanation is that the traditional division of labor in families undermines women’s career pursuits. Women in heterosexual marriages tend to take on the lion’s share of child-care and homemaking tasks,

which can reduce the time and energy available to pursue careers (Sánchez et al., 2021). Yet ample evidence also shows that women are kicked off the corporate "fast track" when they start having children and their colleagues view them as unfit for competitive and time-consuming work, a problem that intensified during the Covid-19 pandemic when important paid work was done remotely from home offices (Fry, 2022).

These explanations start to shed light, but there are no simple answers as to why women, who make up more than half of the working-age population, and especially women of color, still lag so dramatically behind men in Congress and the corporate boardroom. Sociology allows us to understand the myriad reasons why women account for less than one-third of Congress and make up only a minuscule proportion of all top CEOs in the United States, why women—especially Black and Hispanic women—are more likely than White men to work in low-paying clerical and retail jobs, why women are likely to spend more time on child care, and why women as a whole have less economic and political power than men. However, sociology does more than help us explain gender inequalities in work, family, politics, and the economy; it provides a lens for understanding why gender is such an important distinction in society. For instance, sociologists question the societal persistence of the gender binary, or the notion that there are two genders—male and female—when in fact gender is an extraordinarily complex continuum that encompasses persons whose gender identity is fluid and does not conform neatly to the category of male or female (Lampe et al., 2019).

(From right) Betty Dukes, Patricia Surgeson, Stephanie Odle, and Christine Kwapnoski charged that Walmart systematically discriminated against its hourly and salaried female employees by denying them promotions and equal pay.

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In this chapter, we will take a sociological approach to understanding gender and gender inequality. Gender historically has served as a way for societies to divide people into two broad categories: "men" and "women." According to this socially created division, men and women are expected to think and act in different ways across most life domains. Gender also serves as a social status, since in almost all societies, men's roles are valued more than women's roles are (UN Women, 2022). At the same time, the cultural expectation that heterosexual cisgender men must be strong, silent, and economically self-sufficient creates tremendous pressure, with some researchers going so far as to argue that these pressures can be physically and emotionally dangerous to men, especially those who do not live up to this narrow definition of masculinity (Springer, 2010). Sociologists also examine how society differentiates people on the basis of gender, and how these differences serve as the basis for social inequalities (Chafetz, 1990). As you have learned already, women continue to lag behind men in politics, employment, and more. Yet understanding gender inequality requires much more than just documenting differences between men and women. We also need to

understand how society's reliance on the gender binary (referred to as the "cisgendering of reality") contributes to the marginalization and oppression of persons who do not fit neatly into the categories of male and female (Sumerau et al., 2016). Gender nonconforming persons are a diverse population, including people whose gender blends elements of a woman and a man, those who identify as a gender other than either female or male, and those who prefer not to identify with a particular gender at all. By contrast, transgender persons usually identify as female or male, yet their identity differs from the gender they were assigned at birth (National Center for Transgender Equality, 2023).

Despite the importance of gender and gender identity to everyday life, sociologists recognize that this factor alone does not shape our life experiences. Rather, our experiences as women, men, or gender nonconforming persons vary widely on the basis of sexual orientation, race, ethnicity, social class, age, birth cohort, religion, nation of origin, and even our marital or parental status (Choo & Ferree, 2010). This recognition that gender intersects with other traits, such as sexual orientation, race, or social class, to affect our life chances is referred to by sociologists as the study of intersectionality (McCall, 2005). Broader social contexts also matter: The ways that gender shapes our experiences may also differ markedly in wealthy Western nations and lower-income nations concentrated in the Global South (Mohanty, 2013).

We will first identify core concepts involving sex, gender, and gender identity and the related but distinct concept of sexuality. Next, we will provide an overview of influential sociological and feminist theories that guide our understanding of gender. We will then review cutting-edge research on the ways that gender shapes our lives in the United States and throughout the world. In this section, we will focus on major social institutions such as the educational system, the workplace, the family, and the government, including guarantees (or deprivation) of civil liberties on the basis of sex, gender, and sexual orientation worldwide. We will conclude by addressing several unanswered and controversial questions about the importance of gender in contemporary society.

# Glossary

gender binary

The classification of sex and gender into two discrete, opposite, and nonoverlapping forms of masculine and feminine.

gender nonconforming
: Identifying as a gender other than male or female, or not identifying with a particular gender at all.

transgender
: Identifying as or expressing a gender identity that differs from a person's sex at birth.

intersectionality
: A sociological perspective that holds that our multiple group memberships affect our lives in ways that are distinct from single group memberships. For example, the experience of a Black woman may be distinct from that of a White woman or a Black man.

# 1 BASIC CONCEPTS

**Understand the ways that gender differences reflect biological factors, sociocultural influences, and the complex interplay between the two. Understand the distinctions between sex, gender, gender identity, and sexual orientation.**

Before delving into an exploration of the powerful ways gender shapes our everyday lives, it is critical to first define core concepts. The first critical distinction is between sex and gender. Sex refers to physical differences of the body, whereas gender concerns the psychological, social, and cultural differences between women and men, such as personality, goals, and social roles. The distinction between sex and gender is fundamental because many of the most important differences between females and males are not biological. While sex is something we are born with, gender is something that we both learn and do. Sex and gender historically have been viewed as a binary, such that the two categories of male and female, or masculine and feminine, are seen as distinctive and nonoverlapping—even opposing (Lorber, 1996). However, scholars and laypersons today widely recognize that viewing gender as a dichotomy is both incorrect and overly simplistic. For instance, the binary excludes intersex persons, who are born with genitals, chromosomes, or reproductive organs that don't fit into a male/female sex binary. The binary also creates an excessively narrow view of gender—one that does not align with the complex realities of gender.

How do children’s toys contribute to gender role socialization?

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Gender is a broad construct that comprises two distinct dimensions: gender identity and gender expression. Gender identity refers to how one sees and describes one’s self, such as one’s sense of being a woman or man, being a girl or boy, or having an identity that sits outside the binary, such as genderqueer or nonbinary. One’s gender identity can be the same as or different from the sex assigned at birth. A person whose gender identity aligns with the sex assigned to them at birth is referred to as

cisgender. Transgender, by contrast, is “an umbrella term used to describe the full range of people whose gender identity does not conform to what is typically associated with their sex assigned at birth” (American Psychological Association, 2015, p. 863). Gender identity may not necessarily be visible to others, however. Gender expression refers to how one chooses to convey gender identity through behavior, clothing, voice, mannerisms, and other external characteristics. These expressions may or may not conform to socially defined behaviors and characteristics typically associated with being either masculine or feminine (Human Rights Campaign Foundation, 2022).

While people often think of gender expression and gender identity as the same thing as sexual orientation, that is not the case. Sexual orientation refers to one’s enduring emotional, romantic, or sexual attraction to other people. *Heterosexual* or *straight* refers to those who are physically or emotionally attracted to persons of another sex, whereas *gay* refers to persons whose enduring physical, romantic, and/or emotional attraction is to persons of the same sex. Some gay women refer to themselves as *lesbians*. *Bisexual* persons are attracted to persons of the same gender and a different gender, and their preferences may change throughout their lifetime. Some people do not feel strong sexual attractions at all; persons who identify as *asexual* or “ace” have little interest in forming sexual or romantic ties. Importantly, an individual’s sexual orientation is independent of their gender identity. Transgender and cisgender people may identify as straight, gay, lesbian, bisexual, and so on. Some prefer not to use a label at all.

Sexual and gender minority (SGM) is the broad label applied to populations that include, but are not limited to, individuals who identify as lesbian, gay, bisexual, asexual, transgender, queer, and/or intersex. SGM populations also encompass those who do not self-identify with one of these terms but whose sexual orientation, gender identity or expression, or biology is characterized by nonbinary constructs of sexual orientation, gender, and/or sex (Bates et al., 2022). While the label SGM includes a diverse array of identities, expressions, and sexual orientations, the label was designed to acknowledge that each subgroup may be at risk of oppression and social disadvantage, due to society’s adherence to the gender binary and a culture and political system that have historically privileged heterosexual and cisgender persons.

Another important concept is gender role socialization, or the process through which we learn about gender and gender-typed roles and practices from socializing agents such as the family, peers, schools, and the media (as discussed in Chapter 4). Much of the research in this area focuses on the ways that young people learn to engage in behaviors or adopt characteristics typically associated with being a boy or girl. For example, boys may learn how to engage in rambunctious and aggressive play by watching their favorite male superheroes on TV, whereas young girls may learn how to nurture their younger siblings by following the model set by their mothers or grandmothers. Through contact with primary and secondary agents of socialization, children internalize the social norms and expectations that correspond with their sex. Gender differences are not biologically determined; they are culturally produced.

We also learn how to "do" gender expression in our daily interactions with others (West & Zimmerman, 1987). Our clothing choices, how we wear our hair, and the pitch and intonation of our voice are all indications of how we "do gender" each day. This process of doing gender underscores the notion that gender is "socially constructed." Theorists who believe in the social construction of gender reject biological bases for gender differences. Gender identities emerge, they argue, in relation to perceived sex differences in societies and cultures, which in turn shape and even perpetuate those differences. For example, a society in which cultural ideas of masculinity are characterized by physical strength and tough attitudes will encourage men to cultivate a specific body image and set of mannerisms (Butler, 1989; Connell, 1987; Scott & Morgan, 1993). Men who fail to comply with what scholars call hegemonic masculinity —the social norms dictating that men should be strong, self-reliant, and unemotional—may be subtly sanctioned for not enacting gender roles in a way that is consistent with prevailing cultural norms (Connell & Messerschmidt, 2005).

Mainstream social constructions of gender tend to demand conformity by presenting only two choices of gender identity—male or female—presenting challenges to those who do not conform to this binary. One study of transgender youth, carried out more than two decades ago, revealed the struggles they faced in negotiating their identities while trying to adhere to the demands from both family and peers to conform to the gender binary (Dietert & Dentice, 2013). More recent research demonstrates that parents and peers who embrace a more expansive

notion of gender and gender expression can help their children create their own gender categories. Ethnographer Tey Meadow (2019) observed that in "facilitative families," parents of gender nonconforming children agreed to call their children by their new chosen names, allowed them to wear whatever clothing they chose, and even approached authorities to alter the gender designation on their children's passports and birth certificates.

# Understanding Sex Differences: The Role of Biology

One of the most persistent questions in the study of gender is "How much are differences in the behavior of women and men the result of sex—that is, biological differences—rather than gender socialization?" Some researchers assert that innate behavioral differences between the sexes appear in some form in all cultures; studies of sociobiology (Goldberg, 1999) and evolutionary behavior strongly support this idea (Eagly & Wood, 2011). For example, the fact that in almost all cultures, men rather than women take part in hunting and warfare suggests that men possess biologically based tendencies toward aggression that women lack. Scholars who endorse this perspective might also look at current occupational patterns and attribute them to biology. According to data from the U.S. Bureau of Labor Statistics (BLS, 2022c), in 2022, 94 percent of dental hygienists, 93 percent of secretaries, and 88 percent of registered nurses in the United States were women, whereas 98 percent of auto mechanics and 95 percent of welders were male. Supporters of the "nature" perspective might point out that women are "wired" to choose jobs that are supportive and nurturing, whereas men opt for jobs that require more physical strength or mechanical ability.

Most social scientists are unconvinced by these arguments, and even view them as potentially dangerous. In her classic book *The Lenses of Gender*, Sandra Lipsitz Bem (1993) notes that this kind of biological essentialism rationalizes and legitimizes gender differences as the natural and inevitable consequences of the intrinsic biological natures of women and men. As such, social influences are neglected or minimized. For example, social scientists who denounce biological essentialism would argue that the level of aggressiveness in men varies widely across

cultures, and women are expected to be more passive or gentle in some cultures than in others (Elshtain, 1981).

Further, some argue that women are just as aggressive as men; however, women use strategies that are consistent with gender role socialization. One meta-analysis of aggression in "real-world" (rather than laboratory) settings found that men generally show higher levels of aggression than women at all ages, yet among children and teens, women were more likely to use "indirect aggression" (Björkqvist, 2018). For instance, adolescent girls will use "interpersonal aggression," such as malicious gossip, "bad-mouthing," or cyberbullying, rather than physical fights (Björkqvist et al., 1994; Vogels, 2022). Other data suggest that as gender roles change over time, girls may become more physically aggressive. A report by the National Center for Education Statistics (NCES, 2022d) found that 4 percent of adolescent females in grades 9–12 got into a serious fight at school in the past year, 15 percent participated in a fight anywhere, 14 percent participated in a group-against-group fight, and nearly 6 percent attacked another person with the intent to cause serious harm.

Theories of "natural difference" are often grounded in data on animal behavior, critics say, rather than in anthropological or historical evidence about human behavior, which reveals variation over time and place. Despite critiques of the "nature" perspective, the hypothesis that biological factors determine behavior patterns cannot be wholly dismissed. Studies document persuasively that biological factors—including genetics, hormones, and brain physiology—differ by sex, and that these biological differences are associated with some social behaviors, including language skills, interpersonal interactions, and physical strength. However, nearly all social scientists agree that theories based solely on an innate predisposition neglect the vital role of social interaction in shaping human behavior.

What does the evidence show? One group of studies investigates female-male differences in hormonal makeup. Some have claimed that the male sex hormone, testosterone, is associated with a propensity for violence (Archer, 1991). Research has indicated, for instance, that male monkeys castrated at birth become less aggressive than noncastrated monkeys; conversely, female monkeys given testosterone become more aggressive than normal females. However, it has also been found that providing monkeys with opportunities to dominate others actually increases

testosterone levels. It may not be the case that the hormone causes increased aggression; instead, aggressive behavior may affect production of the hormone (Steklis et al., 1985). In other words, there might be slight biological differences between men and women, but these small differences may be exacerbated and amplified by social contexts that promote behaviors that are consistent with gendered stereotypes and expectations.

Another source of evidence is direct observation of animal behavior. Researchers who connect male aggression with biological influences often emphasize male aggressiveness among the higher animals. Among chimpanzees, they say, males are consistently more aggressive than females. Yet critics note that there are large differences among types of animals. Gibbons, for instance, show few sex differences in aggression. Moreover, many female apes or monkeys are highly aggressive in some situations, such as when their young are threatened.

Other evidence comes from studies of identical twins, who derive from a single egg and have exactly the same genetic makeup. In one anomalous but particularly high-profile case, one identical male twin was seriously injured while being circumcised, and the decision was made by his physician and parents to reconstruct his genitals as female. He was thereafter raised as a girl. At age six, the twins demonstrated typical male and female traits as found in Western culture. The little girl enjoyed playing with other girls, helped with the housework, and wanted to get married when she grew up. The boy preferred the company of other boys, his favorite toys were cars and trucks, and he wanted to become a firefighter or police officer (Colapinto, 2001).

For some time, this case was treated as conclusive evidence of the overriding influence of social learning on gender differences. However, when the girl was a teenager, she was interviewed during a television program and revealed some unease about her gender identity, even wondering if perhaps she was "really" a boy after all. She had by then learned of her unusual background, and this knowledge may have led to an altered perception of herself (Colapinto, 2001).

Technological advances in the last three decades have provided another source of evidence: brain-imaging research, which has identified several key differences between men's and women's brains (Brizendine, 2007, 2010). For example, Douglas Burman and his colleagues (2008) found

that the brains of school-age girls were more highly “activated,” or worked harder, than the brains of school-age boys when presented with spelling and writing tasks. This greater level of activation has been associated with greater accuracy in performing such tasks. The authors do not conclude that girls’ language skills are superior to those of boys, yet they do argue that their data show that girls and boys learn language in different ways. A mounting body of research concludes that gender differences in brain functioning may contribute, in part, to a wide range of social outcomes, including communication style, empathy, depression, anxiety, and fear. However, most scholars conducting this research are careful to point out that biological differences are almost always exacerbated or fostered by social contexts and norms (McCarthy, 2015).

# Gender Socialization: How Gender Differences Are Learned

As we noted earlier, gender role socialization describes the processes through which we learn what it means to be “male” or “female” in our society. This approach distinguishes between biological sex and social gender—an infant is born with a sex and develops a gender. Children are guided in this process by positive and negative sanctions, that is, socially applied forces that reward or restrain behavior. For example, a young boy could be positively sanctioned for complying with masculine expectations (“What a brave boy you are!”) or negatively sanctioned for violating these expectations (“Boys don’t play with dolls. What are you, a sissy?”). Historically, if an individual developed gender practices that did not correspond with their biological sex, the explanation given was inadequate socialization. According to functionalist perspectives, socializing agents help maintain the smooth continuation of the existing social order by overseeing the smooth gender socialization of new generations. (See Chapter 1 for a review of the core themes of functionalism.)

Functionalist perspectives prevailed during the mid-twentieth century, yet in the late twentieth and early twenty-first centuries, this rigid interpretation of sex roles and socialization has been harshly criticized on a number of fronts. Many writers argue that gender socialization is not an inherently smooth process; different agents, such as families, schools, and peer groups, may be at odds with one another. Moreover,

socialization theories ignore individuals' ability to reject or modify the social expectations surrounding sex roles. Humans are not passive objects or unquestioning recipients of gender programming, as some sociologists have suggested. People actively create and modify roles for themselves. Gender is a product of individual choices and preferences, as well as social, contextual, and biological influences. As Meadow's (2019) ethnography of transgender children revealed, even quite young children can carve out gender identities that they feel fit them best, especially with the support of their parents, teachers, and friends.

Consider the following two scenes. Two newborns, a few hours old, lie in the nursery of a hospital maternity ward. One, a male, is wrapped in a blue blanket; the other, a female, is in a pink blanket. Their respective grandparents are seeing them for the first time. The conversation between one pair of grandparents runs along these lines:

> Grandma A: There he is—our first grandchild, and a boy.
>
> Grandpa A: Hey, isn't he a hefty little fellow? Look at that fist he's making. He's going to be a regular little fighter, that guy is. (Grandpa A smiles and throws out a boxing jab to his grandson.) Atta boy! [ . . . ]
>
> Grandma A: Let's go and congratulate the parents. I know they're thrilled about little Fred. They wanted a boy first.
>
> Grandpa A: Yeah, and they were sure it would be a boy, too, what with all that kicking and thumping going on even before he got here.

When they depart to congratulate the parents, the grandparents of the other child arrive. The dialogue between them goes like this:

> Grandma B: There she is . . . the only one with a pink bow taped to her head. Isn't she darling.
>
> Grandpa B: Yeah—isn't she little. Look at how tiny her fingers are. Oh, look—she's trying to make a fist.
>
> Grandma B: Isn't she sweet . . . You know, I think she looks a little like me.
>
> Grandpa B: Yeah, she sorta does. She has your chin.

> Grandma B: Oh, look, she's starting to cry . . . Poor little girl. (To the baby) There, there, we'll try to help you.
>
> Grandpa B: Let's find the nurse. I don't like to see her cry . . .
>
> Grandma B: Hmm. I wonder when they will have their next one. I know Fred would like a son, but little Fredericka is well and healthy. After all, that's what really matters.
>
> Grandpa B: They're young yet. They have time for more kids. I'm thankful too that she's healthy. (Walum, 1977)

The contrast between the two conversations sounds so exaggerated that it's tempting to think they were made up. In fact, they are transcripts of actual dialogue recorded in a maternity ward. While this study was carried out nearly five decades ago, the underlying message of these conversations persists today. The first question usually asked of a new parent—in Western culture, at least—is "Is it a boy or a girl?" Expectant parents today can buy over-the-counter tests or eagerly await the results of an ultrasound to tell them the sex of their fetus. "Gender reveal" parties, where expectant parents share pink or blue cakes with their friends as a celebratory way to announce the sex, have become so common that they're now referred to as "a new ritualization during pregnancy" (Pasche Guignard, 2015). The implication is that sex matters, because parents will raise boys and girls in different ways (Nugent, 2012). Once the infant is born and is marked as male or female, nearly everyone who interacts with the child will treat them in accordance with their gender. People do so on the basis of the society's assumptions, which lead them to treat women and men differently, even as opposites, affirming the cultural pervasiveness of the gender binary (Zosuls et al., 2009).

From the moment a child is born, we mark the baby as a boy or a girl, affirming the gender binary.

Clearly, gender socialization is very powerful, and challenges to it can be upsetting. As sociological studies repeatedly show, once a gender is "assigned," society often expects individuals to act like "females" or "males." These expectations are fulfilled and reproduced in the practices of everyday life (Bourdieu, 1990; Lorber, 1994). As we shall see later in this chapter, challenges to the gender binary can be met with hostility, discrimination, and even violence (Human Rights Campaign Foundation, 2022).

# The Social Construction of Gender: How We Learn to "Do Gender"

Socialization and gender role socialization theories have been highly influential in the sociological study of gender, yet these perspectives also have detractors who adhere to social constructionist perspectives. Rather than seeing sex as biologically determined and gender as culturally learned, these critics argue that both sex and gender are socially constructed products. Not only is gender a purely social creation that

lacks a fixed essence, but the human body itself is subject to social forces that shape and alter it in various ways.

Scholars who focus on gender roles and role learning accept that there is a biological basis for some gender differences. Adherents to socialization perspectives believe that the biological distinction between the sexes is the starting point for differences that become culturally elaborated and amplified in society. In contrast, theorists who believe in the social construction of gender reject all biological bases for gender differences.

Proponents of social constructionist views argue that gender is more than learning to act like a girl or boy; rather, it is something that we continually "do" in our daily interactions with others (West & Zimmerman, 1987). We learn how to present ourselves as "male" or "female" or "nonbinary" through our choice of behaviors, clothing, hairstyle, stance, body language, and even tone of voice (Darwin, 2017). For example, a number of scholars have uncovered the discouraging finding that some young heterosexual women "play dumb" both because they believe it is consistent with gendered expectations for how girls should act and because they believe that doing so may help bolster the feelings of masculinity among the boys they are hoping to attract as romantic partners (Gove et al., 1980). At the same time, young men feel great pressure to be strong, confident, and funny to attract a partner.

Just as many cisgender youth strategically "do gender," transgender youth may "do transgender" (Connell, 2010). For instance, one digital ethnography of transgender young people revealed how they strategically selected particular clothing items or hairstyles for their social media photos (Darwin, 2017). Wearing T-shirts and jeans is one way to display an androgynous appearance. Another approach is to strategically mix gender cues. As one trans woman told the researcher, "I personally try to achieve a lot of 'center of center' effects by picking articles of clothing that cross a gender boundary away from my assigned birth sex (male), but then somehow do it in a way that 'comes back' towards it. Examples would be, I often wear an outfit with skirts or leggings, but then the color scheme would be drab earth tones, more typical of colors men tend to wear" (Darwin, 2017).

How we "do gender" or "do transgender" also varies widely by race, social class, and social context (Fenstermaker & West, 2013). We selectively choose to enact different aspects of gender expectations based

on what we think will work best in a particular setting. For example, sociologist Nikki Jones (2009) found that young inner-city African American women would adjust their voice, stance, walk, and style of speaking in different situations, thus giving off the impressions of being "aggressive," "good," or "pretty" when they thought a particular type of femininity would "pay off." Jones described the ways that 22-year-old Kiara would "do gender." Kiara was hoping to collect signatures for a petition to stop a new development in a poor neighborhood adjacent to her own. As Jones (2009) describes:

> [Kiara] confidently, assertively, even aggressively approaches men on the street to sign her petition and then draws on normative expectations of manhood and femininity to encourage them to add their names to the list: Babies and women are in danger, she tells them, letting the implication that real men would sign up to protect babies and women hang in the air. She switches from aggressive to demure just long enough to flirt with a man passing by on the street and then to defiant when she passes the police station on the corner. "They don't give a fuck!" she declares loudly.

Kiara's behavior shows the complexities of gendered expectations in contemporary social life.

# Social Construction of Gender Around the World

The subtle ways in which we do gender are so much a part of our lives that we don't notice them until they are missing or radically altered. Cross-cultural research conducted by anthropologists over the past century, in particular, helps us recognize how deeply entrenched gendered categories are in the United States and shows us strong evidence that gender is fluid and socially constructed. After all, if gender differences were mostly the result of biology, then we could expect that gender roles would not vary much from culture to culture.

## New Guinea

In her classic New Guinea study, *Sex and Temperament in Three Primitive Societies*, Margaret Mead (1935/1963) observed such wide variability among gender role prescriptions—and such marked differences from those in the United States—that any claims to the universality of gender roles had to be rejected. Mead studied three separate tribes in New Guinea: In Arapesh society, both females and males generally exhibited characteristics and behaviors that would typically be associated with the Western female role. Both sexes among the Arapesh were passive, gentle, unaggressive, and emotionally responsive to the needs of others. In contrast, Mead found that in another New Guinea group, the Mundugumor, both the females and males were characteristically aggressive and, from a Western observer's perspective, excessively cruel, especially toward children. In both cultures, however, women and men were expected to behave very similarly. In a third group, the Tchambuli tribe of New Guinea, gender roles were almost exactly reversed from the roles traditionally assigned to females and males in Western societies. Women "managed the business affairs of life" while "the men . . . painted, gossiped and had temper tantrums" (Mead, 1972).

## The !Kung

The !Kung of the Kalahari Desert have specific gender roles, but it is very common for both women and men to engage in child care. Due to the nonconfrontational parenting practices of the !Kung, who oppose violent conflict and physical punishment, children learn that aggressive behavior will not be tolerated regardless of one's gender. Although the !Kung abide by the seemingly traditional arrangement whereby "men hunt and women gather," the vast majority of the tribe's food actually comes from the gathering activities of women (Draper, 1975). Women return from their gathering expeditions armed not only with food for the community but also with valuable information for hunters.

## The *Bacha Posh* in Afghanistan

Formerly called Manoush, Mehran Rafaat, left, with her twin sisters, is regarded as a boy by her family. As a *bacha posh*, Mehran can work outside the home and appear in public without an escort.

In contemporary Afghanistan, boys are so highly prized that families with only daughters often experience shame and pity; as a result, some transform one young daughter into a son. The parents cut the girl's hair short, dress her in boy's clothes, change her name to a boy's name, and encourage her to participate in "boys' activities" such as bicycling and playing cricket. These children are called *bacha posh*, which translates into "dressed up as a boy" (Corboz et al., 2020).

Parents of bacha posh believe that boys are afforded so many advantages in Afghan culture that it is beneficial to transform their girls into boys. A bacha posh can more easily receive an education and work outside the

home, and can even escort her sisters in public, allowing freedoms that are unheard of for girls in a society that strictly segregates men and women. In most cases, a return to womanhood takes place when the child enters puberty, a decision almost always made by her parents (Corboz et al., 2020).

## Blurring the Boundaries Between the Genders

Despite widespread adherence to the “gender binary,” numerous cultures throughout history and across the globe have challenged the binary. The Spaniards who came to both North and South America in the seventeenth century noticed men in the native tribes who had taken on the mannerisms traditionally associated with women, as well as women who occupied male roles.

Several Native American cultures hold a special honor for persons of “integrated genders.” For example, the Navajo term *nádleehí* literally means “one who constantly transforms” and refers to a male-bodied person with a feminine nature, a special gift according to Navajo culture. The Navajo believe that to maintain harmony, there must be a balanced interrelationship between the feminine and the masculine within a single individual (Jacobs et al., 1997). Native activists working to renew their cultural heritage adopted the English term *two-spirit* as useful shorthand to describe the entire spectrum of gender and sexual expression that is better and more completely described in their own languages (Nibley, 2011). In the contemporary United States, the number of persons who identify outside the male/female binary has risen dramatically in recent years, alongside a growing number of cultural portrayals of transgender and gender nonconforming persons. A Pew Research Center (2022b) survey found that 1.6 percent of U.S. adults are transgender or nonbinary. This share increases with each successive birth cohort. Just .03 percent of persons ages 50+ and 1.6 percent of those ages 30 to 49 identify as trans or nonbinary, compared to more than 5 percent of those under age 30. Celebrities including Emmy-award-winning actress Laverne Cox and *Juno* actor Elliot Page have spoken publicly about their gender transitions. On March 30, 2022, President Joseph Biden issued a proclamation recognizing Transgender Day of Visibility, the first time the White House had done so. Nonbinary persons have also made great strides; singers Janelle Monáe and Sam Smith have come out as nonbinary. In April 2022, the federal government announced that

Americans can select "X" rather than "male" or "female" as the gender marker on their passports, where the "X" signifies "unspecified or another gender identity" (Blinken, 2022).

Taken together, anthropological and sociological studies of gender reveal that culture, not biology, underlies gender differences. Sociologists have noted that while society teaches "masculine" and "feminine" gender roles, such an approach does not explain where these roles come from or how they can be changed. For this, we need to delve into classic and contemporary theoretical perspectives that shed light on how gender roles and gendered inequalities are built into social institutions (Lorber, 1994).

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**CONCEPT CHECKS**

1. **What is the difference between sex and gender?**
2. **How do gender identity and gender expression differ?**
3. **How do both biology and gender socialization contribute to differences between men and women?**
4. **What does it mean to say that gender is something we "do"? Give an example of a way you do gender in your daily life.**
5. **How can studies of gender around the world contribute to the argument that gender is socially constructed?**

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# Glossary

sex
: The biological and anatomical differences distinguishing females and males.

gender
: Social expectations about behavior regarded as appropriate for the members of each sex. Gender refers not to the physical attributes distinguishing men and women but to socially formed traits of masculinity and femininity.

intersex
: Describes individuals possessing both male and female genitalia. Although statistically rare, this subpopulation is of great interest to gender scholars.

gender identity
: How individuals see and describe their own gender.

cisgender
: Describes individuals whose gender identity matches their biological sex. Statistically, this is the most common gender. It would include persons born female who identify as female and persons born male who identify as male.

gender expression
: How a person chooses to convey gender identity through behavior, voice, mannerisms, and other external characteristics.

sexual orientation
: An individual's enduring emotional, romantic, or sexual attraction to other people.

sexual and gender minority (SGM)
: The broad label applied to populations that include, but are not limited to, individuals who identify as lesbian, gay, bisexual, asexual, transgender, queer, and/or intersex.

gender role socialization
: The learning of gender roles through social factors such as schooling, the media, and family.

social construction of gender
: The learning of gender roles through socialization and interaction with others.

hegemonic masculinity
: Social norms dictating that men should be strong, self-reliant, and unemotional.

biological essentialism
: The view that differences between men and women are natural and inevitable consequences of the intrinsic biological natures of men and women.

# 2 SOCIOLOGICAL THEORIES OF GENDER INEQUALITIES

**Recognize and contrast competing explanations for gender inequality. Learn some feminist theories about gender equality.**

Investigating and accounting for gender inequality has become a central concern of sociologists. Explanations vary widely, from functionalist approaches, which view such differences as key to societal stability, to radical feminist approaches, which view gender inequalities as a product of cisgender male oppression. These perspectives have been advanced to explain men's enduring dominance over women—in the realm of economics, politics, the family, and elsewhere. In this section, we review the main theoretical approaches to explaining gender inequality in society.

## Functionalist Approaches

Functionalist approaches see society as a system of interlinked parts that, when in balance, operate smoothly to produce social solidarity. Thus, functionalist and functionalist-inspired perspectives on gender argue that gender differences, and, specifically, men's and women's specialization in different tasks, contribute to social stability and integration. Though popular in the 1950s and 1960s, these perspectives have been heavily criticized for neglecting social tensions at the expense of consensus, for reifying the gender binary, and for perpetuating a conservative view of the social world.

Scholars who support the concept of natural differences argue that women and men perform those tasks for which they are biologically best suited. The anthropologist George Murdock (1949) saw it as practical and convenient that women should concentrate on household labor and family responsibilities while men worked for pay outside the home. On the basis of a cross-cultural study of more than 200 societies, Murdock concluded that the gender-based division of labor is present in all cultures and that,

although not the result of biological programming, it is the most logical and efficient basis for the organization of society.

Sociologist Talcott Parsons studied families in industrial societies (Parsons & Bales, 1955). He was particularly interested in the socialization of children and believed that stable, supportive families were the key to successful socialization. He saw the family as operating most efficiently with a clear-cut sexual division of labor in which women carry out *expressive* roles, providing care and security to children and offering them emotional support, and men perform an *instrumental* role—namely, being the breadwinner. Because of the stressful nature of men's role, women's expressive and nurturing tendencies should also be used to comfort and care for men. This complementary division of labor, springing from a biological distinction between the sexes, would ensure the solidarity and stability of the family, according to Parsons.

The degree to which a society is open to women performing stereotypically male activities changes across time and by context. For example, during World War II many women took jobs in aircraft factories.

Another perspective on gender differences that is consistent with core themes of functionalist theories is attachment theory, advanced by psychologist John Bowlby (1953). Bowlby argued that the mother is crucial to the primary socialization of children. If the mother is absent or

if a child is separated from the mother at a young age, the child may be inadequately socialized. This can lead to serious social and psychological difficulties later in life, including antisocial and psychopathic tendencies. Bowlby argued that a child's well-being and mental health require a close, personal, and continuous relationship with the mother or a female mother substitute. Some have used Bowlby's maternal deprivation thesis to argue that working mothers are neglectful of their children.

Social scientists have sharply criticized claims of a biological basis for the sexual division of labor, arguing that there is nothing natural or inevitable about the allocation of tasks in society. Women are not prevented from pursuing occupations on the basis of biological features; rather, humans are socialized into roles that are culturally expected. Further, a steady stream of evidence suggests that the maternal deprivation thesis is questionable; studies have shown that children's educational performance and personal development are in fact enhanced when both parents work outside the home at least part of the time (e.g., Brooks-Gunn et al., 2010).

Parsons's notion of the "expressive" female has also been attacked for implicitly condoning the subordination of women in the home. There is no basis for the belief that the "expressive" female is necessary for the smooth operation of the family—rather, the role is promoted largely for the convenience of men.

In addition, cross-cultural studies show that societies vary greatly in terms of the degree to which they differentiate and assign tasks as being exclusively men's or women's (Gornick & Meyers, 2003). The extent to which certain tasks can be shared, and even how open groups and societies are to women performing men's activities and roles, differs across cultures, across time, and in different political and economic contexts. Finally, cultures differ in the degree to which men are seen as "naturally" dominant over women. Thus, gender inequalities do not seem to be fixed or static.

Biological determinists see gender inequalities and differences based on gender as inevitable and unchangeable because they are consequences of biological necessities, not of social processes. Feminist scholars do not deny that men and women have distinctive biological characteristics, yet they argue that physical differences alone cannot explain the stark gender differences in men's and women's social and economic roles (e.g., Grosz,

1994). Sociological approaches, in general, hold that society, more than biology, guides gendered roles, interactions, and status differences today. Sociologists also emphasize that gender inequality is tied to issues of race and class. Women—rich and poor, Black and White, immigrant and native born—may share similar biological characteristics, yet their social experiences are vastly different (Rothenberg, 2007).

# Feminist Theories

The feminist movement has given rise to a large body of feminist theory that attempts to explain gender inequalities and set forth agendas for overcoming those inequalities. While feminist writers are all concerned with women's unequal position in society, their explanations for it vary substantially. There is no one "feminism." Rather, different schools cite a variety of deeply embedded social processes such as sexism, patriarchy, capitalism, and racism. The following sections look at the arguments behind five main feminist perspectives—liberal, radical, socialist, Black, and postmodern feminism.

## Liberal Feminism

Liberal feminism sees gender inequalities as rooted largely in social and cultural attitudes. Unlike radical feminists, liberal feminists do not see women's subordination as part of a larger system or structure. Instead, they identify many separate factors that contribute to inequalities—for example, sexism and discrimination in the workplace, in educational institutions, and in the media. They focus on establishing and protecting equal opportunities for women through legislation and other democratic means. Liberal feminists actively supported legal advances such as the Equal Pay Act of 1963 and the Civil Rights Act of 1964, arguing that mandating equality in law is essential to eliminating discrimination against women. Because liberal feminists seek to work through and within the existing political and economic systems to bring about reforms in a gradual way, they are more moderate in their aims and methods than radical feminists, who call for an overthrow of the existing system (Tong, 2009).

While liberal feminists have contributed greatly to the advancement of women over the past century, critics charge that they have been

unsuccessful in dealing with the root cause of gender inequality and do not acknowledge the systemic nature of women's oppression in society (Bryson, 1999). Critics say that by focusing too much on the independent deprivations women suffer—sexism, discrimination, unequal pay—liberal feminists draw only a partial picture of gender inequality. Radical feminists accuse liberal feminists of encouraging women to accept an unequal society and its competitive character.

## Radical Feminism

At the heart of radical feminism is the belief that men are responsible for, and benefit from, the exploitation of women. The analysis of patriarchy—the systematic domination of females by males—is of central concern, being viewed as a universal phenomenon that has existed across time and cultures. Radical feminists identify the family as one of the primary sources of women's oppression. They argue that men both exploit women by relying on their unpaid domestic labor in the home and, as a group, deny women access to positions of power and influence in society (Tong, 2009).

Radical feminists differ in their interpretations of the basis of patriarchy, but most agree that it involves some form of appropriation of women's bodies and sexuality. In her classic writings, Shulamith Firestone (1970) argued that because men control women's roles in reproduction and child-rearing, women become dependent materially on men for protection and livelihood. This "biological inequality" is socially organized in the nuclear family. Firestone argued that women can be emancipated only through the abolition of the family and the power relations that characterize it.

Other radical feminists point to male violence against women as central to male supremacy. In this view, intimate partner violence, rape, and sexual harassment are all part of the systematic oppression of women, rather than isolated cases of pathological or criminal perpetrators. Even interactions in daily life—such as nonverbal communication, patterns of listening and interrupting, and women's sense of comfort in public—contribute to gender inequality. Moreover, popular conceptions of beauty and sexuality are imposed on women by men to produce a certain type of femininity. For example, social and cultural norms emphasizing a slender body, youthful face, and caring, nurturing attitude toward men perpetuate

women's subordination. The objectification of women through the media, fashion, and advertising turns women into sexual objects whose main role is to please and entertain men (Kilbourne, 2019).

Radical feminists do not believe that women can be liberated from sexual oppression through legislative reforms or gradual attitudinal change. Because patriarchy is a systemic phenomenon, they argue, gender equality can be attained only by overthrowing the patriarchal order.

In asserting that "the personal is political," radical feminists have drawn attention to the many linked dimensions of women's oppression. Their emphasis on male violence and the objectification of women has brought these issues into the heart of mainstream debates about women's subordination.

Many objections can be raised to radical feminist views. A key objection is that the concept of patriarchy is inadequate as a general explanation for women's oppression (Tong, 2009). Radical feminists have tended to claim that patriarchy has existed throughout history and across cultures—that it is a universal phenomenon. Critics argue, however, that the concept of patriarchy as a universal phenomenon does not leave room for historical or cultural variations. It also ignores the important influence of race, class, and ethnicity on the nature of women's subordination; in short, it fails to recognize that not all men have equal power to act as oppressors, and not all women are equally subjugated. In fact, seeing patriarchy as a universal phenomenon risks biological reductionism—attributing all the complexities of gender inequality to a simple distinction between men and women. This limitation was called out publicly in 2008, when a group of scholars and activists noted that some radical feminists rejected the assertion that transgender women are women, and thus called for their exclusion in female spaces—an act that many considered transphobic (Pearce et al., 2020).

## Socialist Feminism

Radical feminism maintains that the objectification of women in advertising contributes to gender inequality by turning women into sexual objects for men's pleasure.

Developed in the 1970s, socialist feminism incorporates key themes of Marxist theory, which we introduced in Chapter 1. Like Marxist theory, socialist feminism argues that capitalist society is oppressive toward ethnic minorities and working-class and poor persons. Like radical feminism, it also recognizes the fundamental oppression of women in patriarchal societies. Bringing these two themes together, socialist feminism focuses on the ways that gender and social class intersect. Importantly, adherents of this perspective depart from Marxist theorists because they believe that dismantling the capitalist hierarchical system is not sufficient to eradicate inequalities; gendered systems of stratification also must be eradicated (Martin, 1986).

Socialist feminists depart from other types of feminists in important ways. They challenge liberal feminists' vision that equality for women in all institutions of society, including government, law, and education, is possible through policy reforms. Socialist feminists reject the notion that true equality is possible in a society whose social and economic structures are fundamentally flawed. They depart from radical feminists, however, because socialist feminists believe that women should work with men to fight class oppression. Socialist feminists do not generally believe that sex and the patriarchy are the sole roots of oppression; rather, gender is just one of several axes of oppression (Holmstrom, 2002).

## Black Feminism and Transnational Feminism

Do the versions of feminism just described apply equally to the experiences of both White women and women of color? Many Black feminists and feminists from the Global South claim they do not. They argue that the main feminist schools of thought address the dilemmas of White, predominantly middle-class women living in industrialized societies and in traditional two-parent families, and that it is not valid to generalize theories about women's subordination from the experience of a specific group. Moreover, the very idea of a unified form of gender oppression that all women experience equally is problematic (Collins, 2008) and neglects the concept of intersectionality, or the recognition that challenges facing women of color are often distinct from those facing White (and especially White middle-class) women (McCall, 2005). Consistent with intersectionality perspectives, Black feminist scholar Moya Bailey (2021) asserts that Black women are vulnerable to

*misogynoir*, or misogyny directed toward Black women in which both race and gender play a role.

Gloria Jean Watkins, better known as bell hooks, wrote extensively on the distinct challenges facing women of color.

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Dissatisfaction with existing forms of feminism has led to the emergence of Black feminism, which concentrates on the problems facing Black women. Black feminist writings emphasize aspects of the past that inform current gender inequalities in the Black community: the legacy of slavery, segregation, and the civil rights movement. They point out that early Black suffragettes supported the campaign for women's rights but realized that the question of race could not be ignored because Black women were discriminated against on the basis of both race and gender. In recent years, Black women have not been central to the women's

liberation movement in part because their race informed their identities and political allegiances more than their gender did (Collins, 2008).

Author, feminist, and social activist bell hooks argued that explanatory frameworks favored by White feminists—for example, the view of the family as a mainstay of patriarchy—may not apply in Black communities, where the family often is headed by a woman and provides a safe, supportive haven against racism. In other words, the oppression of Black women may be found in different locations than that of White women.

Black feminists contend that any theory of gender equality that does not take racism into account cannot adequately explain Black women's oppression. Likewise, social class cannot be neglected. Some Black feminists hold that the strength of Black feminist theory is its focus on the interplay between race, class, and gender concerns. When these three factors interact, they reinforce and intensify one another (Brewer, 1993).

Transnational feminism, by contrast, focuses primarily on intersections between nationhood, race, gender, sexuality, and economic exploitation against the contemporary backdrop of global capitalism. This perspective recognizes that global processes, including colonialism, racism, and imperialism, shape gender relations and hierarchies in powerful ways (Mohanty, 2003). Pioneers of transnational feminism recognized that the key themes of liberal feminism, such as concerns about equal pay for equal work or the division of household labor, were not relevant for many women in the Global South (Mezzadri et al., 2022). Scholars working in this tradition often have a strong human rights orientation and see research as integral to social change (Hundle et al., 2019). For instance, by understanding the processes through which female agricultural workers in Brazil are subordinated, transnational feminists can work to increase these women's bargaining power (Thayer, 2010).

## Postmodern Feminism

Like Black feminism, postmodern feminism challenges the idea that all women share a single basis of identity and experience. (Postmodern approaches in sociology were introduced in Chapter 1, and it may be helpful to review that section.) This strand of feminism draws on the cultural phenomenon of postmodernism in the arts, architecture,

philosophy, and economics. Postmodern feminists reject the claim that there is a grand theory that can explain the position of women in society or that there is any universal category of "woman." Consequently, these feminists reject the accounts others give to explain gender inequality—such as patriarchy, race, or class—as "essentialist" (Beasley, 1999).

Instead, postmodern feminism encourages the acceptance of many different standpoints, representing very different experiences (heterosexual, queer, transgender, Black, working-class women, and so on). This diversity among individuals is celebrated in all its diverse forms. Emphasis on the positive side of "otherness" is a major theme in postmodern feminism and symbolizes plurality, diversity, difference, and openness: There are many truths, roles, and constructions of reality (Tong, 2009).

Postmodern feminism is said to have the most difficult relationship with the strands of feminism just discussed (Tong, 2009). This is largely because of its belief that many feminists are mistaken in assuming that it is possible to provide overarching explanations for women's oppression and to find steps toward its resolution.

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**CONCEPT CHECKS**

1. **Contrast functionalist and feminist approaches to understanding gender inequality.**
2. **What are the key ideas of liberal feminism? What are criticisms of this perspective?**
3. **What are the key ideas of radical feminism? What are criticisms of this perspective?**
4. **How do the key ideas of socialist feminism challenge the main themes of liberal and radical feminism?**
5. **Do you think that postmodern feminism is incompatible with liberal, radical, and Black feminist perspectives? Why or why not?**

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**Table 10.1 APPLYING SOCIOLOGY TO GENDER**

| CONCEPT | APPROACH TO UNDERSTANDING GENDER | CONTEMPORARY APPLICATION |
|---|---|---|
| **Social constructionist approaches** | Gender identities are not predetermined but emerge in relation to perceived sex differences in societies and cultures, which in turn shape and even perpetuate those differences. | A husband who loses his job may refuse to do housework as a way to “do gender” and reassert his masculine identity. This places a burden on his wife and perpetuates gendered social roles. |
| **Socialization approaches** | Gendered identities and behaviors are learned, via processes of reinforcement and imitation—similar to other forms of learning. | A young girl who likes to play football is admonished to “act more ladylike.” She may learn to stop playing traditionally masculine sports and seek out more traditionally feminine ones. |

| CONCEPT | APPROACH TO UNDERSTANDING GENDER | CONTEMPORARY APPLICATION |
|---|---|---|
| **Functionalist approaches** | Gender differences and, specifically, men's and women's specialization in different tasks contribute to social stability and integration. | In the mid-twentieth century, many Americans believed it was "best" for the family and an efficient division of labor when men were the primary breadwinners and women were the primary caregivers. |
| **Feminist approaches** | Everyday gender differences have their roots in men's and women's unequal positions in society. Social changes must focus on eradicating women's disadvantages. Precisely how these differences can be remedied, and other intersecting sources of differences like race, are emphasized in subtypes of feminist approaches, including liberal, radical, socialist, Black, transnational, and postmodernist. | Feminist social policies hold that paying men and women equally for equal work, paying women for care work, and promoting equity in the workplace and education are ways to move toward gender equality in society. |

# Glossary

feminist theory
: A sociological perspective that emphasizes the centrality of gender in analyzing the social world and particularly the uniqueness of the experience of women. There are many strands of feminist theory, but they all share the desire to explain gender inequality in society and to work to overcome it.

liberal feminism
: The form of feminist theory that posits that gender inequality is produced by unequal access to civil rights and certain social resources, such as education and employment, based on sex. Liberal feminists tend to seek solutions through changes in legislation that ensure that the rights of individuals are protected.

radical feminism
: The form of feminist theory that posits that gender inequality is the result of male domination in all aspects of social and economic life.

patriarchy
: The dominance of men over women. All known societies are patriarchal, although there are variations in the degree and nature of the power that men exercise as compared with women. One of the prime objectives of women's movements in modern societies is to combat existing patriarchal institutions.

Black feminism
: A strand of feminist theory that highlights the multiple disadvantages of gender, class, and race that shape the experiences of non-White women. Black feminists reject the idea of a single, unified gender oppression that is experienced evenly by all women, and argue that early feminist analysis reflected the specific concerns of White, middle-class women.

transnational feminism
: A branch of feminist theory that highlights the way that global processes—including colonialism, racism, and imperialism—shape gender relations and hierarchies.

postmodern feminism
: The feminist perspective that challenges the idea of a unitary basis of identity and experience shared by all women. Postmodern feminists reject the claim that a grand theory can explain the position of women in society, or that there is any single, universal

essence or category of "woman." Instead, postmodern feminism encourages the acceptance of many different standpoints as equally valid.

# 3 RESEARCH ON GENDER TODAY: DOCUMENTING AND UNDERSTANDING GENDER INEQUALITIES

**Learn how social structure creates and maintains inequalities on the basis of gender, gender identity, and sexual orientation. Understand how gender is cast as a binary in society and how that contributes to inequality. Learn the forms these inequalities take in social institutions such as the workplace, families, the educational system, and the political system in the United States and globally.**

As we have learned so far, gender is one of the main dimensions along which we differentiate humans in society. Yet men and women are not merely viewed as different in most societies; in many domains, men and women experience unequal treatment, with men consistently holding more political, economic, and social power. As discussed earlier, male dominance in a society is called patriarchy. Although cisgender men are favored in almost all societies, the degree of patriarchy varies. In the United States, women have made tremendous progress in education, work, politics, and economics, but several forms of gender inequality persist. Male dominance is not the only form of gender-based inequality, however. Cisgender persons historically have had greater power than non-cisgender persons, as most societies abide by a "cisgendering of reality," or a pervasive presumption of a gender binary (Sumerau et al., 2016). Sexual prejudice also exists; this broad bias—which encompasses both homophobia and heterosexism—ignores, devalues, or dismisses the experiences and needs of LGBTQ+ people and gives advantages to heterosexual people (Herek, 2004).

Sociologists define gender inequality as the differences in the status, power, and prestige that women and men have in groups, collectives, and societies. The study of gender inequality has been expanded in recent decades to include inequality on the basis of sexual orientation and gender identity, disparities that have their roots in homophobia and

transphobia. In the following sections, we will review contemporary research that documents both the magnitude of and the explanations for gendered inequalities across multiple domains, including education, the workplace, the family, and politics. We will focus primarily on the United States but will also demonstrate that the disparities in the United States pale in comparison to those in other nations, where the cultural devaluation of women is widespread and where LGBTQ+ and transgender persons face significant and even life-threatening oppression.

# Gendered Inequalities in Education: Unequal Treatment in the Classroom

Sociologists have found that schools help foster gender differences in outlook and behavior. In the past, school regulations compelling girls to wear dresses or skirts served as an obvious means of gender typing. The consequences went beyond mere appearance. As a result of their clothes, girls lacked the freedom to sit casually, to join in rough-and-tumble games, or to run as fast as they were able. Although strict enforcement of school dress has become rare, differences in informal styles of dress persist, still influencing gender behavior in school.

School reading texts also perpetuate gender images. Although this, too, is changing, storybooks and coloring books used in elementary school often portray boys showing initiative and independence, and girls being more passive and watching their brothers. Stories written especially for girls often have an element of adventure, but usually in a domestic or school setting. Boys' adventure stories are more wide-ranging, with heroes who travel to distant places or who, in other ways, are sturdily independent (Fitzpatrick & McPherson, 2010). Studies focused on twenty-first century picture books show that very little has changed since past decades: Female main characters nurtured more than male main characters did, and they were seen in more indoor than outdoor scenes. Occupations were gender stereotyped, and more women than men appeared to have no paid occupation (Hamilton et al., 2006).

In general, people interact differently with men and women, and boys and girls (Lorber, 1994)—even in elementary schools. Studies document that teachers interact differently, and often inequitably, with male and female students in terms of the frequency and content of teacher-student

interactions. Such patterns are based on, and perpetuate, traditional assumptions about male and female behavior and traits. One study showed that, regardless of the sex of the teacher, male students interact more with their teachers than female students do. Boys receive more teacher attention and instructional time than girls do. This is partly because boys are more demanding than girls (American Association of University Women, 1992). Another study reported that boys are eight times more likely to call out answers in class, thus grabbing their teachers' attention, and that even when boys do not voluntarily participate in class, teachers are more likely to solicit information from them than from girls. However, when girls try to bring attention to themselves by calling out in class without raising their hands, they are reprimanded (Sadker & Sadker, 1994).

How does gender affect teacher-student interactions in the classroom?

In addition, the content of teacher-student interactions differs depending on the sex of the students. For example, the assumption that girls are poor at or lack interest in math may lead teachers to shy away from engaging girls in discussion during math class, ultimately perpetuating girls' insecurity about their ability to succeed at this subject (Gunderson et al., 2011). After observing elementary school teachers and students over many years, researchers found that teachers helped boys in working out the correct answers, whereas they simply gave girls the correct answers

and did not engage them in the problem-solving process. In addition, teachers posed more academic challenges to boys, encouraging them to think through their answers to find the best possible response (Sadker & Sadker, 1994).

Boys were also disadvantaged in important ways, however. Because of their rowdy behavior, they were more often scolded and punished than the female students. Moreover, boys outnumber girls in special education programs by startling percentages. Sociologists have argued that school personnel may be mislabeling boys' behavioral problems as learning disabilities. These patterns can have long-term effects; punishment, especially the most severe forms, such as school suspension, are linked with poorer grades, lower graduation rates, and ultimately poorer prospects for gainful employment (NCES, 2019b).

The ways that gendered stereotypes and expectations hurt boys and girls are even more harmful for African American children, underscoring the importance of intersectionality. A study of what it was like to be a Black female pupil in a White school reported that while the Black girls were, like the boys, initially enthusiastic about school, they altered their attitudes because of the difficulties they encountered. Even when the girls were young, age seven or eight, teachers would disperse them if they were chatting in a group on the playground, while tolerating similar behavior among White children. Once treated as "troublemakers," the Black girls rapidly became so (Bryan et al., 1987). Other work shows that Black girls were reprimanded more than Black boys or White girls for talking loudly, as such behavior was not considered appropriately feminine. As sociologist Edward Morris (2007) found in his study of elementary school classrooms, Black girls' manners were occasionally criticized by teachers, who would refer to outspoken girls as "loudies" rather than "ladies."

Similar racial gaps emerge among boys, albeit for different reasons. Black boys are more likely than White boys to be disciplined harshly, consistent with stereotypes that equate Black masculinity with aggression. These Black-White disparities start as young as preschool or elementary school. A study by the National Center for Education Statistics (2019b) found that 18 percent of Black boys in public elementary and secondary schools had been punished with an out-of-school suspension, a rate more than 10 times higher than for White girls (1.7 percent), more than 3 times higher than for White boys (5 percent),

and nearly 2 times higher than for Black girls (9.6 percent). Black boys in elementary, middle, and high school are also more likely than any other subgroup of students to be physically restrained and even referred to law enforcement for misbehavior. Experts attribute these strong disciplinary reactions to stereotypes about race and masculinity, and to the fact that young Black boys are viewed as older than they actually are. One fascinating study concluded that “Black boys [are] seen as responsible for their actions at an age when White boys still benefit from the assumption that children are essentially innocent” (Goff et al., 2014).

## The Gendering of College Majors

College is a time of exploration, when students take both general-education classes and specialized classes within their chosen major that prepare them for a career or further education after graduation. Even in the twenty-first century, men and women differ starkly in the majors they choose, opting for fields that are consistent with gender-typed socialization; women focus on fields associated with caring and nurturing, whereas men tend to pursue fields that emphasize logic and analysis. Yet the majors women tend to choose are precisely those fields that garner the lowest earnings after graduation, whereas men are channeled into majors with high economic returns.

A research study by Glassdoor (Chamberlain & Jayaraman, 2017) that spanned a seven-year time period, from 2010 to 2017, found that women dominated college majors such as social work (85 percent), health care administration (84 percent), nursing (80 percent), and education (66 percent). By contrast, men dominated engineering fields such as mechanical engineering (89 percent), civil engineering (83 percent), and computer science and engineering (74 percent).

Feminist scholars note that this stark gender segregation among college majors is one important reason for the persistent gender gap in pay. Glassdoor (Berry, 2018) ranked college majors based on median base salary and found that social work (median annual salary $41,656), health care administration ($42,000), and education ($43,000) were among the lowest ranked. Comparatively, engineering fields dominated heavily by men drew a median base salary of between $61,000 (civil engineering) and $68,438 (electrical engineering).

Research on how young people choose their majors consistently shows that subtle forces, including input from parents, friends, and guidance counselors; a lack of same-sex role models; active encouragement (or discouragement) from teachers; and limited exposure to particular fields of study, tend to channel women into "female-typed" majors and men into "male-typed" majors (Morgan et al., 2013; Porter & Umbach, 2006).

# Gendered Inequalities in the Workplace

Gender plays a powerful role in shaping workplace experiences. Everything from the jobs we hold, to how much we earn, to our treatment at the hands of coworkers and supervisors, is powerfully shaped by gender. Although women have seen tremendous progress in both rates of labor force participation and entry to a wide variety of occupations over the past century, as we shall see, stark inequities persist.

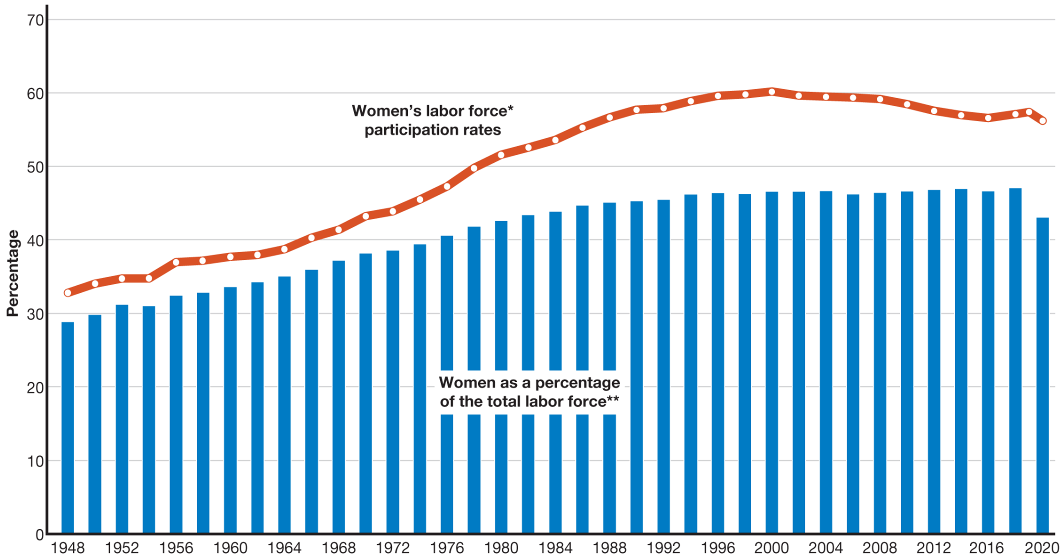
Women currently account for roughly half (47 percent) of the total workforce. This proportion is a drastic increase from 1950, when women represented just 30 percent of the paid workforce. Nearly 57 percent of women are now employed outside the home, up from just 34 percent of women in 1950 (U.S. BLS, 2017c, 2019b, 2023m). Although women's entry into the paid labor force is a fairly contemporary phenomenon, dating back only to the early 1970s, some women have always worked for pay. Poor, immigrant, and ethnic minority women have always had relatively high rates of employment. For example, in the United States in the early twentieth century, the female labor force consisted mainly of young, single women and children. More than a third of gainfully employed women were maids or house servants. When women or girls worked in factories or offices, employers often sent their wages to their parents. When young women married, they typically withdrew from the labor force.

Since then, women's participation in the paid labor force has risen more or less continuously, especially since the 1950s (**Figure 10.1**). However, since peaking at 60 percent in 2009, women's labor force participation has declined slightly. Men's rates of labor force participation also declined over this period, from 86 percent in 1950 to 80 percent in 1970 to roughly 68 percent in 2020 (U.S. BLS, 2022f). These patterns largely reflect the fact that more younger men are in college and more older men

are exiting the labor force in their fifties and sixties, due either to the early onset of work-related disabilities or the fact that Social Security benefits enable them to retire comfortably—a benefit that was not available in the 1950s and 1960s (U.S. BLS, 2017a, 2019b). A more telling number may be the proportion of men in their prime working years, ages 25 to 54, who are currently working. In 2000, fully 92 percent of men in that age group were working, although the figure had dipped to 69 percent by 2019 (U.S. BLS, 2022f).

Figure 10.1

**WOMEN'S PARTICIPATION IN THE LABOR FORCE IN THE UNITED STATES, 1948–2022**




*Women in the labor force as a percentage of all civilian women age 16 and over.

**Women in the labor force as a percentage of the total workforce (both men and women) age 16 and over.

Source: U.S. BLS, 2022f.

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Macroeconomic conditions are an important influence on the gender composition of the paid labor force. For instance, during the Great Recession of the late 2000s and early 2010s, men's employment rates dropped more steeply than women's employment rates because the types of jobs men work in were affected more severely (Mulligan, 2010). Men

are more likely than women to work in the industries of finance, insurance, real estate, and construction, which were particularly hard hit during the recession. However, these patterns reversed during the Covid-19 pandemic, when women's labor force participation rates dropped more steeply than men's, with particularly steep drops for Black and Latina women, women working in low-wage jobs, and those with children under age six (Lim & Zabek, 2021). The strains of juggling homeschooling with paid work, and the risks imposed by working in jobs like nursing assistant during the pandemic, took a toll on women's economic well-being.

Perhaps an even greater change in labor force participation has occurred among married mothers of young children. In 1978, only 14 percent of married women with preschool-age children worked full time year-round, yet this figure had increased to 67.9 percent by 2022; three-quarters (76.7 percent) of women with children between the ages of 6 and 17 were in the labor force in 2022 (U.S. BLS, 2023m). The latter figure dropped again in 2021, down to 75.5 percent, given the work and family burdens women faced in the Covid-19 pandemic (U.S. BLS, 2022g). One impetus behind women's increased entry into the labor force was the increasing demand for clerical and service workers in the mid-twentieth century, as the U.S. economy expanded and changed (Oppenheimer, 1970). From 1940 until the late 1960s, labor force activity increased among women who were past their prime child-rearing years, such as "empty nest" women whose children had left the family home. During the 1970s and 1980s, as the marriage age rose, fertility declined, and women's educational attainment increased, the growth in labor force participation spread to younger women. Many women now postpone marriage and child-rearing to complete their education and establish themselves in the labor force. Despite family obligations, today a majority of women of all educational levels work outside the home during their child-rearing years (Padavic & Reskin, 2002). Unmarried mothers are even more likely than married mothers to work during their child-rearing years. In 2022, 75 percent of unmarried mothers with children under 18 years old were in the labor force, compared with 86 percent of married fathers (U.S. BLS, 2023m).

## Occupational Segregation

Until relatively recently, women were overwhelmingly concentrated in routine, poorly paid occupations. The clerk (office worker) provides a good illustration. In 1850 in the United States, clerks held responsible positions requiring accountancy skills and carrying managerial responsibilities; fewer than 1 percent were women. The twentieth century saw a general mechanization of office work (starting with the introduction of the typewriter in the late nineteenth century), accompanied by a downgrading of the clerk's status—in tandem with that of an analogous occupation, secretary—into a routine, low-paid occupation. Women filled these occupations as the pay and prestige of such jobs declined (Reskin & Roos, 1990). In 2016, 94 percent of all secretaries and administrative assistants in the United States were women (U.S. BLS, 2018a).

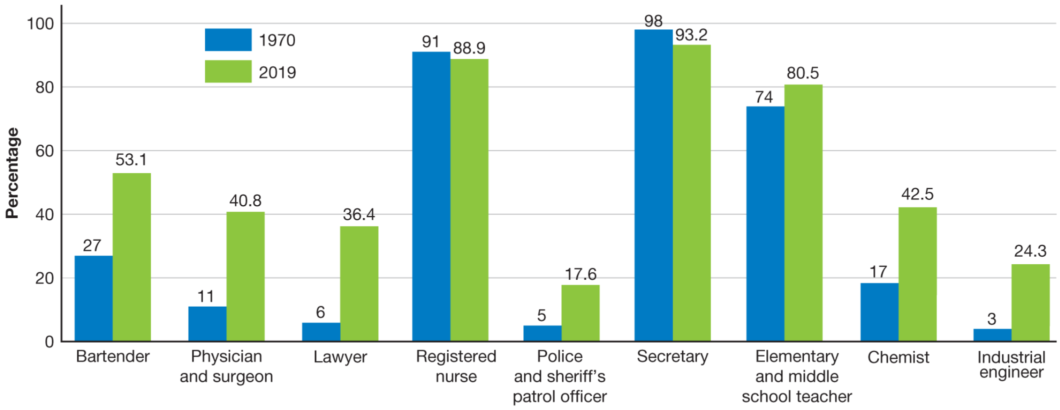
Studies of certain occupations reveal how gender typing occurs in the workplace. Expanding areas of lower-level work, such as secretarial or retail sales positions, attract a substantial proportion of women. These jobs are poorly paid and hold few career prospects. Men with good educational qualifications aspire to something higher, whereas others choose blue-collar work. Once an occupation has become gender typed, inertia sets in: Job hierarchies are built around the assumption that men will occupy superior positions, while a stream of women will flow through subordinate jobs. Employers are guided in future hiring decisions by gender labels. And the very conditions of most female jobs lead to adaptive responses on the part of women—low job commitment, few career ambitions, high turnover, the seeking of alternative rewards in social relations—which fortify the image of women as suitable for only lower-level jobs (Lowe, 1987). These social conditions reinforce outlooks produced by early gender socialization, as women may grow up believing that they should put their husbands' careers before their own. (Men also are frequently brought up to believe the same thing, placing pressures on men to earn a good living to support their families.)

Women have recently made inroads into occupations once defined as "men's jobs." By the 1990s, women constituted a majority of workers in previously male-dominated professions such as accounting, journalism, psychology, and public service. In fields such as law, medicine, and engineering, the proportion of women rose substantially between 1970 and 2019 (**Figure 10.2**). Women now account for more than one-third of all lawyers and physicians. Further, for the first time ever, in the 2008–

2009 academic year, American women earned more doctoral degrees than men did. In 2021, women earned 46 percent of all doctoral degrees. However, men continue to earn a majority of doctorates in traditionally male-dominated fields such as mathematics and computer sciences (76 percent) (Glazer, 2019; National Center for Science and Engineering Statistics, 2021; NCES, 2018a; Okahana & Zhou, 2018).

Figure 10.2

**OCCUPATIONAL SEGREGATION**




Note: Women as a percentage of total employed.

Source: U.S. BLS, 2020a.

Recent evidence also suggests that the influx of women into particular fields may wax and wane over time. For example, women made tremendous inroads in computer programming in the 1970s and 1980s. The proportion of young women majoring in computer science tripled from roughly 13 percent to 36 percent between 1970 and 1985, yet these numbers have inched downward steadily over the past three decades. Today, 18 percent of college women are majoring in computer science, a trend that experts attribute to a fascinating and counterintuitive phenomenon: the proliferation of home computers starting in the 1980s and forward (Hinn, 2014; McCain, 2022). As more and more homes would acquire PCs (and computer games), the perception spread that computer games and video games were “for boys.” A content analysis of video games certainly reinforces that assumption—male characters outnumber female characters by roughly six to one (Williams et al., 2009). Popular films in the 1980s like *War Games* and *Weird Science*

underscored the notion that boys, but not girls, could use computers for fun, adventure, and both professional and social advancement. As a result, parents, peers, and teachers may have subtly conveyed the messages to young women that computer science wasn't for them, thus contributing to the plummeting numbers of female computer science majors in the late twentieth and early twenty-first centuries (Hinn, 2014). National educational initiatives like Girls Who Code and events like Girls in Tech Hackathons were developed to encourage girls, and especially African American girls, to consider pursuing computer programming or other high-tech professions (Hatch, 2017; Leckart, 2015).

However, recent evidence suggests that women working in high-tech professions are still dramatically outnumbered by men, a factor that undermines their workplace satisfaction and prospects for advancement. The *2023 Women in Tech Report* found that nearly half of women technologists say they are outnumbered by men in their workplace by a four-to-one ratio (Skillsoft, 2023). In part due to this gender imbalance, nearly one-third are dissatisfied with their current growth potential and 36 percent are considering leaving their jobs due to a lack of equity in opportunities. These data suggest that it's not enough to encourage women to enter tech professions; rather, employers must provide the structural supports needed to retain and advance them in their careers.

## The "Glass Ceiling"

Although women are increasingly entering traditionally male jobs, they may not be seeing increases in pay—or increases in occupational mobility—because of the glass ceiling, a promotion barrier that prevents women's upward mobility. The glass ceiling is particularly problematic in male-dominated occupations and professions, such as finance. Women's progress is blocked not by virtue of innate inability or lack of basic qualifications but by lack of the sponsorship of powerful senior colleagues to articulate the women's value to the organization or profession (Alvarez et al., 1996). As a result, women progress into middle-management positions but do not, in proportionate numbers, move beyond them. While we often think of the glass ceiling as something that happens only in corporate America, women workers including Walmart cashiers and restaurant cooks also hit a glass ceiling. For example, women employees successfully sued Outback Steakhouse on the grounds that they could not get promoted to the higher-level profit-

sharing management positions in the restaurants (U.S. Equal Employment Opportunity Commission [EEOC], 2009). They also were denied favorable job assignments, particularly kitchen management experience, which was required for employees to be considered for the top management job in the restaurant chain. One explanation for women's blocked mobility is that dated gender stereotypes persist. Research shows that college-educated White males in professional jobs identify potential leaders as people who are like them. Women are thus assessed negatively because they deviate from this norm (Cleveland, 1996).

Ironically, men who work in female-dominated professions do not face similar obstacles to promotion. To the contrary, they enjoy a boost up the corporate ladder. In 1992, sociologist Christine Williams coined the term *glass escalator* to reflect men's rapid ascent up the hierarchy when they work in female-dominated professions. She found that employers singled out male workers in traditionally female jobs—such as nurse, librarian, elementary school teacher, and social worker—and promoted them to top administrative jobs in disproportionately high numbers. These men often "face invisible pressures to move up in their professions. Like being on a moving escalator, they have to work to stay in place," writes Williams (1992). These pressures may take positive forms, such as close mentoring and encouragement from supervisors, or they may be the result of prejudicial attitudes of those outside the profession, such as clients who prefer to work with male rather than female executives.

In 2013, however, Williams updated her theory to more fully reflect the concept of intersectionality. She now argues that the glass escalator is most beneficial and relevant to White men who hold stable middle-class jobs, noting that "gay men and racial/ethnic minority men, in particular, seemed to be excluded from the benefits of the glass escalator" (Williams, 2013). She further notes that not all workplaces have a glass escalator; rather, the escalator operates only in organizations with stable employment, clear-cut job hierarchies, and career ladders—all aspects of the workplace that have changed dramatically over the past two decades.

Researchers have observed one particular situation in which women do shatter the glass ceiling, yet in doing so are often set up to fail: the *glass cliff* scenario. The glass cliff refers to a situation in which women are promoted to higher positions during times of crisis or turmoil or amid an economic recession, when the chance of failure is more likely (Ryan et

al., 2016). For example, Carol Bartz was appointed CEO at Yahoo in January 2009, a time when the internet company was struggling. She was hired on a four-year contract and developed a strategic plan to turn things around (Glass & Cook, 2016). But about two and a half years later, she received a call from the chair of the Yahoo board and was fired. Bartz is not alone; researchers have documented multiple high-visibility cases of women leaders in the United States, the United Kingdom, and elsewhere in similar straits. Many suffered stress and burnout, and even found their careers derailed (Ryan et al., 2016).

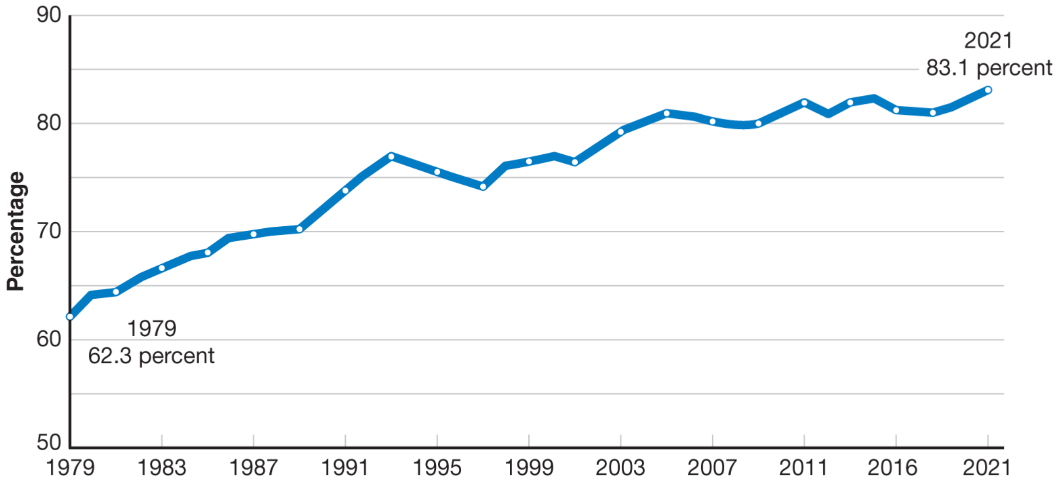
The glass ceiling and glass cliff are among the reasons women continue to earn less than men and hold fewer slots in the upper echelons of corporate America. However, despite these challenges, the gender pay gap has narrowed considerably in recent years (**Figure 10.3**). Between 1960 and 2021, the ratio of women's to men's earnings among full-time, year-round workers increased from 62 to 83 percent. Moreover, this ratio increased among all races and ethnic groups; yet gaps remain. For example, in 2022, White women earned 82 percent as much as their male counterparts, compared with 94 percent for Black women, 88 percent for Hispanic women, and 79 percent for Asian women (U.S. BLS, 2022e). Scholars disagree about why the gender gap persists; we will delve more deeply into these competing perspectives later in the chapter.

## Gender Inequities in Entrepreneurship

Entrepreneurship, or starting one's own business, has long been considered a pathway through which historically oppressed groups, typically immigrants, could circumvent workplace barriers and succeed on their own. But what about women? Can they break through the glass ceiling by breaking out on their own? The answer is mixed. The number of women with their own business has increased steadily over the past several decades. Women-owned firms now account for 42 percent of all enterprises and are growing faster in number than most other types of businesses. Yet women's businesses tend to be much smaller than men's. As a result, women-owned firms employ only 8 percent of the U.S. workforce and contribute 4 percent of business revenues (National Women's Business Council, 2020).

Figure 10.3

**THE GENDER PAY GAP**




Women's earnings as a percentage of men's, for full-time wage and salary workers, 1979–2021 annual averages.

Note: Percentages are calculated from annual averages of median usual weekly earnings for full-time wage and salary workers.

Source: U.S. BLS, 2019e, 2022e.

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Researchers have found that women trying to start their own businesses face greater obstacles than men when trying to secure funding. Research by sociologist Sarah Thébaud sheds light on why women-owned businesses may be under-resourced: unfounded negative perceptions of women business owners by potential funders. In three experiments, Thébaud (2015) tested what a group of 178 college students thought about a series of business plans and, indirectly, the gender of the business owners behind them. In general, she found that the students rated women as less competent than men, even when the business plan was exactly the same. These studies show that the persistence of notions about gender difference perpetuates men's advantages.

A different set of obstacles has been found for sexual and gender minority populations seeking to form their own business. One recent study in the United Kingdom found that 75 percent of LGBTQ+ start-up founders concealed their sexual orientation or gender identity from their work peers (Browne, 2023). Nearly half (45 percent) said they felt it wasn't relevant to the situation, yet 27 percent didn't feel comfortable

sharing that information with investors, while 18 percent feared it would harm their efforts to raise funds for their start-up. Despite these pervasive obstacles, some recent ethnographic evidence documents how gay men have developed and deployed effective entrepreneurial skills against a backdrop of heterosexism and homophobia (Essers et al., 2022). As one entrepreneur told the researchers, "As a [gay man], you see that the environment is different and you realize that there are minorities, which makes you more open-minded, and I do perceive this as a form of intelligence . . . you are being confronted with differences, your thinking process and perspectives start earlier . . . because you can view things from a distance."

## Sexual Harassment in the Workplace

The #MeToo movement cast a national and international spotlight on workplace sexual harassment. Although the harassment of women and sexual and gender minorities in the workforce has existed for decades, awareness and public discussion of this rampant problem exploded in 2017 when many women spoke out against their mistreatment at the hands of film producer Harvey Weinstein. The #MeToo movement began to spread virally on social media, sparked by actor Alyssa Milano's tweet "If all the women who have been sexually harassed or assaulted wrote 'Me too' as a status, we might give people a sense of the magnitude of the problem." More actors, including Ashley Judd, Lupita Nyong'o, Salma Hayek, quickly came forward, recounting their personal experiences of being assaulted or harassed by Weinstein. On a seemingly daily basis in the months that followed, new allegations of sexual assault or harassment were levied against comedian Louis C.K., TV anchor Matt Lauer, and countless others.

While the media frenzy would have us believe that only rich powerful men committed sexual violence in the workplace, sexual harassment occurs in all forms of work, from manufacturing to hospitality to Wall Street. Low-income women workers are especially vulnerable, as they lack the financial wherewithal to quit an abusive work setting (Fitzgerald, 2020). Although most sociological research on gendered inequalities in the workplace historically has focused on occupational status and earnings, in recent years scholars have identified sexual harassment as another important source of inequitable treatment. Sexual harassment is unwanted or repeated sexual advances, remarks, and behavior that are

offensive to the recipient and cause discomfort or interfere with job performance. Power imbalances facilitate harassment; even though women can and do sexually harass subordinates, it is more common for men to harass women because men usually hold positions of authority (Uggen & Blackstone, 2004).

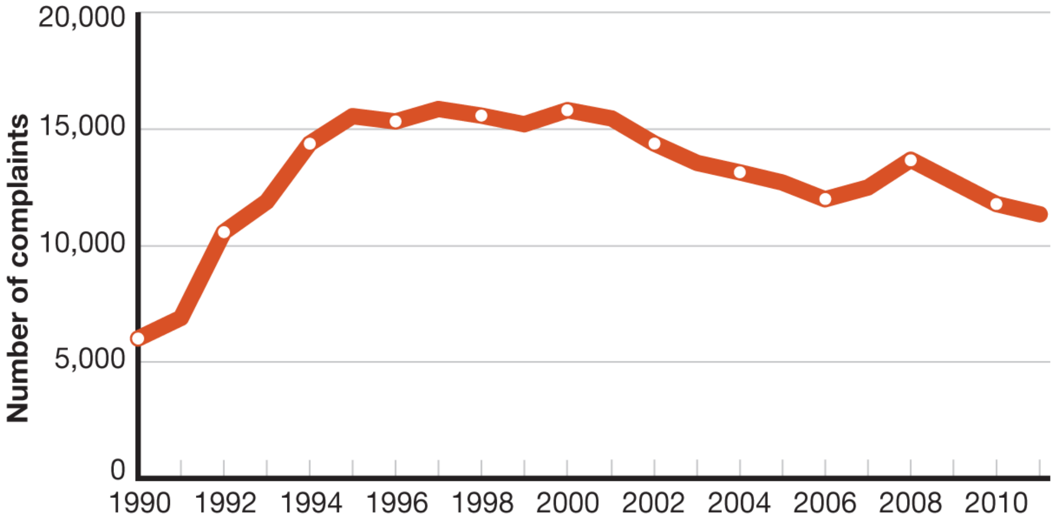
One of the most high-visibility cases of sexual harassment in recent years is the 2017 debacle at Fox News, portrayed in the 2019 movie *Bombshell.* In a single year, Fox News chairman Roger Ailes and talk show host Bill O'Reilly were ousted following multiple charges of harassing women reporters and producers for more than a decade; the company's copresident, Bill Shine, also resigned amid the turmoil. The Fox case garnered international attention because of the high profiles of the men involved, yet similar conditions happen at small firms every day. The U.S. courts have identified two types of sexual harassment. One is the quid pro quo, in which a supervisor demands sexual acts from a worker as a job condition or promises work-related benefits in exchange for sexual acts. The other is the "hostile work environment," in which a pattern of sexual language, sexual advances, or even sexually explicit or demeaning posters makes a worker so uncomfortable that it is difficult for the worker to do their job (Padavic & Reskin, 2002).

In recent years, an increasing number of women working in the male-dominated high-tech industries have spoken up about the hostile work climates they have faced. For example, Whitney Wolfe filed a sexual harassment suit against Tinder. In the suit, Wolfe alleged that company cofounder Justin Mateen had stripped her of a cofounder title because she was a young "girl" who "makes the company look like a joke"—and that he called her a "whore," "gold-digger," and a "disease" (Valenti, 2014).

Recognition of sexual harassment and women's willingness to report it have increased substantially since the testimony of Anita Hill to the Senate Judiciary Committee during the confirmation hearings for Clarence Thomas's 1991 nomination to the U.S. Supreme Court. Hill's recounting of Thomas's harassment raised public awareness of the problem and encouraged more women to report incidents (**Figure 10.4**). In the first six months of 1992 alone, the number of workplace harassment complaints increased by more than 50 percent (Gross, 1992). And 27,291 sexual harassment claims were filed between 2018 and 2021 (EEOC, 2022).

Figure 10.4

**SEXUAL HARASSMENT COMPLAINTS, 1990–2011**




Source: U.S. EEOC, 2011, 2012.

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Despite increased awareness, researchers have found that sexual harassment is vastly underreported (Dahl & Knepper, 2021). Women's reluctance to report harassment reflects several possible factors: Victims may not recognize that sexual harassment is an actionable offense; victims may be reluctant to make complaints, fearing that they will not be believed, that their charges will not be taken seriously, or that they will be subject to reprisals; and it may be difficult to differentiate between harassment and joking on the job (Giuffre & Williams, 1994).

In 1998, the U.S. Supreme Court ruled that the Civil Rights Act outlaws harassment between members of the same sex. The case involved a man who had to quit his job on an offshore oil rig because he had been repeatedly grabbed, ridiculed, and threatened by two male supervisors. The court ruled that neither "roughhousing" among men, nor "flirtations" between men and women, nor even some types of "verbal or physical harassment" are illegal, but that when sexual harassment is so "severely hostile or abusive" that it prevents workers from doing their jobs, it violates the Civil Rights Act—regardless of whether the offender and the harassed person are of the same or the opposite sex (Savage, 1998).

## Global Gendered Inequalities in Economic Well-Being

The United States is not alone in having a history of gender inequality in the workplace. Across the globe, men outpace women in most workplace and economic indicators. Women around the world work in the lowest-wage jobs and are likely to make less than men doing similar work—although there is some evidence that the wage gap is slowly decreasing, at least in industrialized countries (Organisation for Economic Co-operation and Development, 2022). As in the United States, most nations have witnessed tremendous strides in women's economic progress in recent decades.

Globally, just over 50 percent of women participate in the labor force, compared to 80 percent of men (World Bank, 2022m). The World Bank (2022m) found that the gap between the labor force participation rates of men and women decreased only slightly between 1990 and 2019, mainly because both women's and men's participation rates have fallen. Women have high labor force participation rates in high-income countries, such as most European nations, where over two-thirds of the female adult population participates in the labor market and the male-female gap in labor force participation rates is less than 15 percent on average. This is especially true in nations with extensive social benefits (such as paid maternity leave) and where part-time work is possible. In North Africa and South Asia, by contrast, the gender gap in labor force participation is nearly 50 percent. Gender gaps are due largely to variations in women's labor force participation rates, from a high of 86 percent of women in Rwanda to 16 percent in Jordan. In contrast, men's participation rates are relatively stable across countries in different income strata.

Because women throughout the world also perform a greater share of housework and child care at the end of the paid workday than men, often dubbed the "second shift," women work longer hours than men in most developed countries, including the United States. On average, working women in developed nations work 32 minutes more per day than working men (8 hours and 9 minutes, compared to 7 hours and 36 minutes). This gap is even worse in developing nations: 9 hours and 20 minutes for women versus 8 hours and 7 minutes for men (International Labour Organization [ILO], 2016b).

Women remain in the poorest-paying industrial and service-sector jobs in all countries, and in the less industrialized nations they are concentrated in the declining agricultural sector. The feminization of the global workforce has brought with it the increased exploitation of young, uneducated, largely rural women around the world. These women labor under conditions that are often unsafe and unhealthy, at low pay and with nonexistent job security. As noted in Chapter 9, one of the most tragic examples of unsafe work environments was the April 2013 collapse of the eight-story Rana Plaza building in Bangladesh's capital city of Dhaka. More than 1,100 people working in garment and apparel factories housed in the building—most of whom were women—died in the collapse caused by one of the deadliest factory fires in history, and another 2,500 injured workers were pulled from the wreckage (Fitch, 2014).

Despite such tragedies and often unsafe conditions, even poor-paying factory jobs may enable some women to achieve a measure of economic independence and power. Some scholars and activists argue further that women's economic empowerment has contributed in large part to China's meteoric rise as an economic power. An estimated 80 percent of the factory workers in China's Guangdong Province are female, and 45 percent of the world's self-made women billionaires are Chinese (Sorvino, 2017; Zamora, 2022).

At the other end of the occupational spectrum, a study by the International Labour Organization (ILO) concluded that women throughout the world still encounter a "glass ceiling" that restricts their movement into the top positions. Even though women have made progress in moving into managerial and professional positions, globally 6 percent or less of the CEOs of the largest corporations are women, and those who do make it to the top typically earn less than their male counterparts (Catalyst, 2020; ILO, 2015).

Recognition of these inequities is sparking state-level policies and initiatives to promote greater gender equity. In Japan, for example, women have been particularly likely to face barriers to career advancement, especially in professional and managerial positions. In 2010, only 13 percent of such positions were held by women, due both to discriminatory hiring practices and the fact that fully 70 percent of Japanese women exit the workforce when they have their first child (Cunningham, 2013; Simms, 2013; Smith, 2019). However, policy makers in Japan recognize that this is a tremendous loss of worker

potential, especially when low birthrates mean that the nation may soon face a dearth of young workers. In 2013, the government issued a mandate that by 2020, women should hold 30 percent of all upper-management positions in major corporations (Cunningham, 2013). However, by 2020, Japan remained far from its goal, with women occupying just 7.8 percent of all upper-management positions. Just 7.5 percent of companies surveyed reported that they had reached the 30 percent threshold. The Covid-19 pandemic was named as an obstacle, with one manager telling researchers that "because labor costs [were] scaled back during the economic downturn, there [was] a tendency to cut management posts for women" (Yuki, 2020).

Similar quota-based policies have already been passed in France, Iceland, the Netherlands, and Spain, to greater success than in Japan. Women held 39 percent of board seats of major companies in the European Union in 2022 (Gaudiano, 2022). Several nations in the Global South have shown greater progress than wealthy countries in the Global North. In the Philippines and Indonesia, for example, more than 40 percent of senior managers are women. Regionally, women's share of senior management jobs is highest in Eastern Europe and the former Soviet Union, where 38 percent of senior roles are held by women, including 47 percent in Russia and 40 percent in Poland. The reason for these countries' high proportion of women in professional jobs is their long-standing policies supporting working mothers (Grant Thornton, 2017).

Despite trends of general progress in women's economic standing worldwide, women workers suffered a considerable setback during the Covid-19 pandemic. Oxfam (2021) estimated that the pandemic cost women at least $800 billion in lost income in 2020. Women lost more than 64 million jobs in 2020—a 5 percent loss, compared to a 3.9 percent job loss rate for men. The Oxfam study attributed women's greater losses to their overrepresentation in work sectors that offer low wages, few benefits, and little job security. Further, these statistics are considered a conservative estimate because they do not count the lost wages of women working in the informal economy, like domestic workers or street vendors, who could no longer work during shutdowns. Although many women did find new work in the years following the pandemic, the financial impacts will reverberate in years to come—especially for the poorest women (Oxfam, 2021). The World Economic Forum's *Global Gender Gap Report* (2022) estimates that the time it will take to close the

global gender economic gap has increased from 100 years to 136 years due to women's setbacks in the pandemic.

Thanks to the feminization of the global workforce, many women have achieved a degree of economic independence—but often at the price of unsafe labor conditions, low pay, and nonexistent job security.

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# Gendered Inequalities in Families: Division of Household Labor

Jennifer Park Zerkel, 42, like millions of women worldwide, saw her career and earnings plummet during the pandemic. The owner of a tutoring business, she struggled to keep her company afloat when her staff members were out sick or quarantined. She tried her best to keep up with everything herself, from cleaning to administrative work, but to no avail. She told *The New York Times* (Miller, 2021), "If I didn't have kids, I'd be full on trying to get my business back up, but I'm stuck at home. . . . Who's going to take care of my kids?" Her husband works in the film

industry, requiring 12-hour days. Yet even during those times when he's not working on a film, Jennifer bears the brunt of child care. "I am the primary parent," she said. "He'd help with evening routines, but he has other things going on. He'd read for a couple hours, and I'm going, like, 'OK.'"

Jennifer is not alone. Millions of women struggle to balance paid work and family responsibilities, and these struggles existed long before (and will exist long after) the pandemic (Carlson et al., 2022). One key reason women face compromised labor force prospects relative to men is that household duties, ranging from child care to elder care to daily housework, are disproportionately borne by women married to men. Over the past four decades, sociologists have documented that work and family are competing social roles, and women's family lives often impede their career and professional prospects. However, these disparities are largely limited to heterosexual marriages. Extensive research documents that same-sex partners have a more balanced and egalitarian division of household labor, in which couples tend to divide household tasks in terms of ability, task preferences, and time availability, rather than along the lines of traditional gender roles (Brewster, 2017). Although only a handful of studies have explored the division of labor in families in which one or both partners are transgender or nonbinary, these studies also show that the partners have a more egalitarian division of both child-care and homemaking tasks (Tornello, 2020).

Why do heterosexual couples maintain an imbalanced division of labor? Although men now do more housework than they did six decades ago, a large gender gap persists. In 1965, women performed 32 hours of housework per week; this figure had dropped to 18 hours by 2011, and to 15 hours by 2018. By contrast, men's housework increased from 4 to 10 hours per week between 1965 and 2011, and remained unchanged as of 2018. However, these statistics indicate that married women still put in significantly more time than their husbands (U.S. BLS, 2019a; Parker & Wang, 2013).

The American Time Use Survey (ATUS) provides further insights into the ways men and women spend their time each day. On the typical day, 71 percent of men reported doing any housework—such as cleaning, cooking, or doing laundry—compared with 86 percent of women. On those days when women performed any of these activities, they spent an

average of 2.7 hours per day while men spent 2.2 hours (U.S. BLS, 2022i).

Further investigation shows that it is the intersection of gender, marital status, and parental status that most powerfully shapes housework. Childless women do an average of 10 hours of housework a week before marriage and 17 hours after marriage. Childless men, by contrast, do 8 hours before marriage and 7 hours afterward. Married women with more than three kids are the most overworked, reporting an average of about 28 hours, while married men with more than three kids logged only 10 hours of housework a week (University of Michigan Institute for Social Research, 2008).

One reason that wives—even full-time employed, high-earning women—perform more hours of housework than their husbands is that women and men in heterosexual marriages specialize in different chores. The chores that women typically perform are more time-consuming and happen on a daily rather than a sporadic basis. Wives do most of the daily chores, such as cooking and routine cleaning, while husbands take on more occasional tasks, such as mowing the lawn and doing home repairs. The major difference is the amount of control the individual has over when the work gets done. Women's household jobs bind them to a fixed schedule, whereas men's are more discretionary.

Women also spend more time on child-rearing responsibilities, reflecting the persistent and implicit understanding that men and women should be responsible for different spheres. Men are expected to be providers, women to be caretakers—even if they are breadwinners as well as mothers. By reproducing in everyday life these roles learned during childhood socialization, men and women "do gender" and reinforce it as a means for society to differentiate between the sexes.

Some sociologists have further suggested that the division of labor at home is best explained by economic forces: Household work is exchanged for economic support. Because women typically earn less than men, they are more likely to remain economically dependent on their husbands and thus perform the bulk of the housework. These economic models extend beyond male-female marriages; studies of same-sex couples similarly find that when gay and lesbian couples have children, the partner with higher earnings does less housework and child care, and

the one with lower earnings does much more work on the home front (Goldberg et al., 2020).

The housework-earning association is a vicious cycle. The gender gap in housework and child care contributes to women's inferior economic position. Part of the reason that family responsibilities create obstacles for women is that their employers and colleagues may hold stereotypical ideas about women workers—especially the belief that mothers are less committed to their careers and thus less appropriate candidates for promotion than non-mothers. Research by Stanford University sociologist Shelley Correll and her colleagues (2007) found that mothers are 44 percent less likely to be hired than non-mothers who have the same work experience and qualifications, and mothers are offered significantly lower starting pay than equally qualified non-mothers (an average of $11,000 lower in this study) for the same job.

The same forces that conspire to limit women's employment opportunities also may limit men's engagement with child-rearing, carrying long-term implications for father-child relations. The expectation that men should be breadwinners prevents men from taking parental leave, even when the benefit is available to them. Sociologists have observed a "flexibility stigma," where men face a stigma if they take parental leave, cut back on their hours, or take family-friendly work in order to balance child care with paid employment (Coltrane et al., 2013). The persistent gender-typed expectations whereby women prioritize child care and men prioritize paid work have set the stage for women's economic disadvantage relative to men's, and fathers' more tenuous ties with their children relative to mothers' (Lamb & Lewis, 2013).

Yet public policies may be effective in counteracting the obstacles imposed by employers' stereotypical views of mothers in the workplace. A team of sociologists led by Michelle Budig (2012) explored the ways that attitudes toward working mothers and public policies such as parental leave or public child care affected the earnings of women workers in 22 countries. They found that the "motherhood penalty" (or the earnings gap between mothers and childless women) varied across countries, ranging from just 4.5 percent to a whopping 33 percent. The gaps were smallest in nations where the cultural attitudes supported maternal employment and the government provided job-protected parental leave and publicly funded child care.

In the coming decades, experts anticipate that we may see greater gender equity in housework and child care as new generations show greater preferences for flexible and egalitarian arrangements (Dernberger & Pepin, 2020). A recent study of young adults ages 18 to 32 in the United States found that the majority of respondents—regardless of gender or education level—aspired to a romantic relationship in which they would share earnings and household/caregiving responsibilities equally with their partners (Pedulla & Thébaud, 2015). The Pew Research Center reported that 56 percent of adults state that sharing chores is very important to a successful marriage (Geiger, 2016).

# Gender Inequality in Politics

Women are playing an increasingly important role in U.S. politics, although they are still far from achieving full equality. Before 1993, there were only 2 women in the U.S. Senate (out of 100 Senate members) and 29 in the U.S. House of Representatives (out of 435). In 2023, there were 150 women in Congress—25 women in the Senate and 125 women in the House—representing just 28 percent of the 535 members. Sixty-four are women of color (Manning & Brudnick, 2020; Center for American Women and Politics, 2023a).

Women are continuing to make strides in other elected offices, although at a slow pace. In 2023, just 12 of the nation's 50 governors were women. The first woman was appointed to the U.S. Supreme Court in 1981 and the second 12 years later. Four women, including one African American and one Latina, currently occupy seats on the Supreme Court—Elena Kagan, Sonia Sotomayor, Amy Coney Barrett, and Ketanji Brown Jackson—marking an all-time high. It was not until 1984 that Geraldine Ferraro became the first woman nominated as a vice presidential candidate; more than 30 years later, Hillary Clinton was named the 2016 Democratic nominee for president, becoming the first woman nominee for a major political party. As noted in the chapter opener, history was made in 2020 when Kamala Harris became the first woman and the first woman of color elected vice president of the United States.

In January 2021, Kamala Harris was sworn in as the first woman vice president of the United States. The daughter of immigrants from India and Jamaica, Harris is also the first woman of color to hold the nation's second-highest political office.

Women politicians tend to be affiliated with the Democratic Party. In the U.S. Congress 71 percent of women are Democrats, and in state legislatures just over half (55 percent) are Democrats (Center for American Women and Politics, 2023a). However, over the past two decades, the Republican Party—starting with the Tea Party movement in the 1990s and 2000s, and continuing with the MAGA movement of the 2010s and 2020s—has prominently featured women leaders, including former Alaska governor and 2008 vice presidential candidate Sarah Palin and South Carolina governor Nikki Haley. In 2017, Haley took on the position of United States ambassador to the United Nations under President Donald Trump, becoming the first Indian American to serve as a member of a presidential cabinet. In February 2023, she declared that she would run for president in 2024.

Typically, the more local the political office, the more likely it is to be occupied by a woman. One reason is that local politics is often part-time work, especially in smaller cities and towns. Local politics can thus be good "women's work," offering low pay, part-time employment, flexible hours, and the absence of a clear career path (Carr, 2008). The farther

from home the political office, the more likely it is to be regarded as "men's work," providing a living wage, full-time employment, and a lifetime career.

American women are not alone in their recent strides in elected politics. Women are playing an increasingly major role in politics throughout the world. Yet, of the 193 countries that belong to the United Nations, only 22 are presently headed by women. More than 87 countries have chosen a female head of state or government at some point in their history; the United States is not among them (Council on Foreign Relations, 2021). In 2019, women made up less than a quarter (24 percent) of the combined membership of the national legislatures throughout the world (Atske et al., 2019). Regionally, Nordic countries had the highest percentage of women in national legislatures (42.5 percent), while Arab states and Pacific Island nations trailed with only 19 percent and 16.3 percent, respectively (UN Women, 2019). Despite very low ratings on the UN's Human Development Index, Rwanda has the highest share of women in parliament in the world. The U.S. Congress ranks 78th out of 193 countries for which data exist (UN Women, 2019). Women are most likely to hold seats in national legislatures in countries where women's rights are a strong cultural value—where women have long had the right to vote and are well represented in the professions (Kenworthy & Malami, 1999).

Sexual and gender minorities have also made major important strides in U.S. politics in recent years. Like women politicians, LGBTQ+ politicians are overwhelmingly affiliated with the Democratic party. Between 2017 and 2022, the number of LGBTQ+ elected officials in the United States doubled, and the number of persons who identify as transgender or binary saw their representation increase tenfold (LGBTQ+ Victory Institute, 2022). More than three-quarters of LGBTQ+ voters identify as Democrat, 20 percent are independent, and just 5 percent Republican. Pete Buttigieg made history when he was nominated by Joe Biden for the position of secretary of transportation, becoming the first openly LGBTQ+ cabinet member in 2021. The same year was a milestone for transgender persons as well: Dr. Rachel Levine's confirmation as assistant secretary of the Department of Health and Human Services made her the first openly transgender federal official in the nation's history (Associated Press, 2021).

Despite these dramatic and historic increases in representation, LGBTQ+ elected officials still make up just 0.2 percent of all elected officials in the United States, even though LGBTQ+ individuals constitute about 7 percent of the total U.S. population, according to the LGBTQ+ Victory Institute (2022). Its report underscores that LGBTQ+ representation is more important than ever, citing proposed anti-LGBTQ+ legislation and school and library censorship efforts across the country. LGBTQ+ elected officials can and do play a critical role in defending the rights and freedoms of sexual and gender minorities.

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**CONCEPT CHECKS**

1. **Do you believe that girls or boys are more disadvantaged in the classroom? Why?**
2. **Describe at least three examples of how gender inequalities emerge in the workplace. How would a sociologist explain these inequities?**
3. **How do inequalities in the home, especially with regard to housework and child care, reflect larger gender inequities in society?**
4. **What are some important differences between men's and women's political participation?**

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# Glossary

gender inequality
: The inequality between men and women in terms of wealth, income, and status.

gender typing
: Women holding occupations of lower status and pay, such as secretarial and retail positions, and men holding jobs of higher status and pay, such as managerial and professional positions.

glass ceiling
: A promotion barrier that prevents a woman's upward mobility within an organization.

sexual harassment

Unwanted sexual advances by one individual toward another, in which the first person persists even though it is clear that the other party is resistant.

# 4 UNANSWERED QUESTIONS: WHY DO GENDER INEQUALITIES PERSIST?

**Understand how sex segregation contributes to the gender gap in pay, learn about family-leave policies in other countries, explore the effects of gender inequality on cisgender and transgender men, and evaluate the competing explanations for the persistence of gender-based violence.**

We have demonstrated the many forms that gender inequalities take in society, in the workplace, in the family, in politics, and throughout the globe. Yet many readers of this textbook may wonder why gender inequalities still persist, especially during an era when young women outnumber young men in college classrooms, women make up nearly half the workforce, and a woman has served as vice president of the United States. How and why do we see so much progress in some domains, but so little in others?

There are no easy answers to questions of why gender inequalities persist in the United States and throughout the world. In this section, we will delve into three particularly vexing questions about inequality, and we will provide competing insights into why the gender pay gap persists, why cisgender heterosexual men continue to abide so closely to harmful components of masculine social roles and behaviors, and why women are disproportionately the target of gender-based violence, whether on college campuses in the United States or in the war-torn deserts in parts of Africa.

## The Gender Pay Gap: Why Do Women Earn Less Than Men?

The gender gap in pay is widely recognized. In 2022, women earned around 82 cents for every dollar earned by a man (Aragão, 2023). While

the gender gap is now at its narrowest in history, experts believe that much of the recent convergence reflects measurable factors such as women's increasing educational attainment, some declines in gender-based occupational segregation, and increases in women's years of work experience. The narrowing of the gap over the long term is attributable in large part to gains women have made in each of these dimensions. Still, women remain far from achieving pay equity with men (Blau & Khan, 2016). Why?

Sociologists point to sex segregation as a key component of the gender pay gap. Women are disproportionately represented in positions that put them in a subordinate position, such as dental hygienist.

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Many sociologists view sex segregation—the concentration of men and women in different occupations—as a persistent cause of the gender gap in earnings. For instance, according to data from the Bureau of Labor Statistics, occupations with the highest proportion of women include secretary, child-care worker, hairdresser, payroll clerk, receptionist, dental hygienist, speech-language pathologist, elementary and middle school teacher, maid and household cleaner, and nurse. Occupations with the highest proportion of male workers include construction worker, truck driver, pilot, plumber, electrician, carpenter, firefighter, auto mechanic, and machinist (Hegewisch & Tesfaselassie, 2019; U.S. BLS, 2019c).

Sex segregation is problematic because the gender composition of a job is associated with the pay received for that job. This finding has been confirmed in many studies over the past five decades. A classic analysis of 1980 census data (England, 1992) showed that both women and men are disadvantaged by employment in an occupation that is predominantly female. Even “after adjusting for cognitive, social, and physical skill demands, amenities, disamenities, demands for effort, and industrial and organization characteristics, jobs pay less if they contain a higher proportion of females” (England, 1992). More recent analyses show that these patterns have not changed over time, and jobs predominantly held by women have considerably lower wages than jobs largely held by men (Hegewisch & Hartmann, 2014). Ironically, though, as noted in our earlier discussion of the glass escalator, the gender gap persists even among female-dominated occupations. For example, even though women accounted for the vast majority of social workers and elementary/secondary school teachers, women in these jobs earned just 94 percent and 86 percent, respectively, of what their male colleagues earned (Hegewisch & Tesfaselassie, 2019).

Economists and sociologists differ in explaining how occupational segregation leads to a gender gap in pay. Economists focus on women’s occupational choices, while sociologists focus on the constraints women face. Many economists—as well as employers and public policy makers—endorse a human capital theory explanation. Developed by Gary Becker (1964), the theory argues that individuals make investments in their own “human capital” (such as formal schooling, on-the-job training, and work experience) to increase their productivity and earnings. Those who invest more in their own skills and knowledge are considered more productive and consequently are paid higher wages.

Human capital theorists reason that women select occupations that are easy to move in and out of and that offer flexible or part-time hours while still providing moderately good incomes. Central to this argument is the assumption that women’s primary allegiance is to home and family; they seek undemanding or flexible jobs that require little personal investment in training or skills acquisition so that they can better tend to household responsibilities. When women leave the labor force to rear children, their job skills deteriorate, and they suffer a wage penalty when they reenter. Moreover, employers may “invest” less in women workers because they believe women will work less continuously than men.

Feminist sociologists criticize human capital theory on several grounds. For example, they dispute the claim that women "choose" certain occupations. In fact, the forces blocking women from freely choosing a career may be indirect or direct. Childhood socialization promoting traditional gender roles may lead young women to choose occupations that are viewed as compatible with feminine traits such as warmth and nurturance—for example, teaching or nursing. More direct obstacles include discouragement from guidance counselors and college advisers, and discrimination on the part of bosses, coworkers, and customers. As we discussed earlier, women who enter tech positions often leave due to the inhospitable climate for women workers. Also, workplace "gatekeepers" prohibit women from entering certain occupations.

For example, a class-action lawsuit was brought against Costco by more than 700 women workers on the grounds that store management practices prevented women from securing jobs as assistant managers or general managers (Greenhouse & Barbaro, 2007). In January 2014, as part of the settlement, Costco agreed to distribute $8 million in compensation to current and former employees who were incorrectly denied promotions. The company also agreed to evaluate its procedures for promoting assistant general managers and general managers to ensure fairer and less gender-biased practices.

Sociologists further argue that human capital theory neglects power differentials between men and women in the workplace and society. Numerous studies reveal that even when men and women are in the same job, men are paid more (Hegewisch & Tesfaselassie, 2019). Because women's work is devalued by society and by employers, women are rewarded less for their work. Moreover, women's relative powerlessness prevents them from redefining the work they do as "skilled." As long as jobs predominantly filled by women, such as caring for children and the elderly, are viewed as "unskilled" or even "intuitive," and thus requiring little training, wages in women's jobs will remain low.

These competing explanations have very different implications for the future. According to human capital theory, the gender gap in pay could disappear if women and men received equal amounts of education and workplace training and if they took equal responsibility for family commitments such as child care. If feminist sociologists are correct in arguing that women's work is devalued, a drastic change in gender

ideology must occur if men and women are to become equally rewarded for their participation in the workplace.

## Increasing Gender Pay Equity: Lessons from Sweden

In Sweden, new parents—both mothers and fathers—receive 480 days of paid parental leave. The United States is the only industrialized country without federally mandated paid parental leave.

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Gender and family scholars believe that the United States could follow the lead of other nations that have established effective policies to help achieve greater gender equity in the home and the labor force (Blau & Kahn, 2013). Parents in Sweden are entitled to 480 days of paid parental leave when a child is born or adopted. Each parent—should they be two—is entitled to 240 of those days. A single parent is entitled to a full 480 days. Swedish parents can take this time off at any time until their child turns eight. And, recognizing that some parents do not want to return to full-time work after their 480 days have run out, the Swedish government gives workers the legal right to hold onto their jobs and cut back their hours by 25 percent until their child turns eight, although their pay reflects only the hours they work. Parents have state-supported flexibility even after they go back to work; if they need to pick up their child from school or take a few days off to care for a sick child, workers still receive

80 percent of their pay. Similar policies are available in most other European nations and Australia. Current policies in the United States are far less generous, and they are available only to a small fraction of workers. The Family and Medical Leave Act (FMLA), passed during the Clinton administration, allows eligible employees to take up to 12 weeks of *unpaid* leave during any one-year period to care for a new infant or unhealthy family member. However, the benefit extends only to those who have worked for their present company for at least 12 months and worked at least 1,250 hours during that period. Moreover, the FMLA applies only to companies that employ 50 or more workers. Given these rigid restrictions, a study by the Center for American Progress found that only 12 percent of all American employees work for companies that are eligible for FMLA (Glynn, 2015). To address the limitations of the FMLA, 13 states (all historically Democrat leaning) and the District of Columbia have enacted their own paid family leave (PFL) laws: California, Colorado, Connecticut, Delaware, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Oregon, Rhode Island, Virginia, and Washington. Most of these state programs provide parental and family caregiving leave as well as temporary disability insurance to cover paid personal medical leave.

The payoff of more generous policies, like those in Sweden, is well documented. Family-friendly policies help boost parents' (and especially mothers') rates of employment and their lifetime earnings. Workers who are offered paid parental leave are more likely to return to the same firm, which in turn increases the firm's profitability by improving productivity and reducing turnover and absenteeism (Livingston, 2016).

# How Does Gender Inequality Affect Men?

Discussions of gender inequality typically focus on women, given stark and persistent gender gaps in earnings and women's much higher rates of sexual victimization relative to men, as we will discuss next. Yet traditional gender role beliefs and practices exert a profound toll on men as well, undermining the quality of their personal relationships, their freedom to choose professions that mesh with their own interests, their physical and mental health, and, ultimately, their life spans. Pressures for men to abide by the expectations of hegemonic masculinity—or the

cultural beliefs that men should be strong, forceful, and independent—also are linked with men's much higher rates of aggressive behavior, whereby men both perpetuate and are the victims of physical violence. While the overwhelming majority of this research focuses on cisgender men, emerging research suggests that transgender men also feel pressure to comply with norms of hegemonic masculinity. For instance, some transgender men may engage in "defensive masculinity" like aggressiveness, masculine posturing, and bravado, especially in environments they perceive to be unsafe or threatening (Abelson, 2014).

On average, women live about five years longer than men. This gender gap in life expectancy is due in part to the fact that traditional ideas about masculinity keep men from engaging in preventive health care such as getting a Covid-19 vaccine or blood pressure check.

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As we saw in Chapter 7, men make up the vast majority of persons arrested for violent crimes. Data from the Federal Bureau of Investigation (FBI) show that men account for 97 percent of those arrested for forcible rape, 84 percent of those arrested for robbery, and roughly 75 percent of those arrested for vandalism, arson, and motor vehicle theft. Given that aggression begets retaliative aggression, men are also more likely than women to die of a range of violent causes. For instance, men make up almost 90 percent of all homicide deaths (FBI, 2019a). Men, especially young men, are also more likely than women to die from risky and

reckless behaviors, including motor vehicle deaths (Centers for Disease Control and Prevention [CDC], 2022c).

Men also are more likely than women to die of suicide, at every point in the life course; as Chapter 18 will show, women are more likely than men to become depressed, but they are also more likely to turn to others for support and, as a result, are less likely to turn to a violent act like killing themselves. Men also tend to die younger than women; this partly reflects the fact that men, especially those who cling tightly to traditional notions about masculinity, are less likely to go to the doctor for regular checkups or to seek medical attention—acts which might be considered signs of vulnerability or weakness (Springer & Mouzon, 2011). One reason why men were more likely than women to die of Covid-19 was their greater opposition to getting vaccinated and wearing face masks, with some arguing that these adaptations took away their freedoms (Haischer et al., 2022).

Adherence to traditional gender-typed behaviors and attitudes also affects men's daily lives in far less dramatic ways. Men, especially men raised in the mid-twentieth century, often found that their career choices were constrained by the need to be a family's main breadwinner. One study of men and women who graduated from Wisconsin high schools in 1957 found that by the time the men reached their thirties, they had abandoned any hopes of pursuing careers that they found personally rewarding, instead focusing on jobs that paid the bills (Carr, 2005). For instance, one man recounted that he could not pursue his dream of starting his own used car business because it was too risky for a sole breadwinner. Ed explained, "I had a wife and three kids, so it's pretty hard to make a career change without some sort of guarantee. And you don't get any guarantee in sales." Other men explicitly noted that they felt trapped in jobs they found blatantly unpleasant. Bob, a stock handler at a warehouse, described his job: "I couldn't stand it. It was so repetitious, the same thing every day. I knew I was going nowhere, and I couldn't do much about it. You have to just keep on working and keep up with the obligations day to day."

Constraints of the "good provider" role not only limited men's ability to leave undesirable jobs and pursue their personal career goals; these pressures also kept them from being as involved in child care as they would have liked. Nearly every father interviewed in the study said that his work responsibilities impeded the development of close family

relationships. Al, a farm foreman with four children, recalled, “When we first bought [our] house, I worked a [second] part-time job. I used to work until 5, and I’d come home, grab lunch, and then I worked for a contractor driving trucks until 10 at night. When the kids were 6 and 7, I didn’t have much home life with them. I look back now and I wish I had spent more time with them. But, I wanted to get the house paid off.” Don, a heavy machinery mechanic at a paper mill, regretted that he regularly worked nights and weekends. He explained, “I had four children and changing jobs wasn’t an option. . . . The [long] hours I put in helped the family out. But everything has a price. I would have liked to have been with my family more. All four kids now have good educations and good homes in good neighborhoods. I just wish that I could have been around more when they were little” (Carr, 2005).

The pressure on men to make sacrifices so that they can provide for their families takes a long- and short-term toll on their personal relationships. At every age, from childhood to later life, children report more close-knit and supportive relationships with their mothers than with their fathers (Rossi & Rossi, 1990). Fathers’ more tenuous ties with their children dissolve even further upon divorce, creating a situation whereby older unmarried men have few sources of support in later life (Steptoe et al., 2013). For these reasons, the call for gender equality does not benefit women only; rather, equal opportunities for men and women are critical for the health, well-being, and quality of life for all.

# Why Are Women So Often the Targets of Violence?

One of the most disturbing trends documented by gender scholars is the high rate of violence, including sexual violence, against both cisgender and transgender women. From sexual assault on college campuses to the systematic use of rape during wartime, sexual violence remains a pressing concern for scholars and policy makers alike. Why does such violence persist?

## Gender-Based Violence: Concepts and Patterns

Before discussing the reasons why gender-based violence persists, it is important that we first review data describing the magnitude and pervasiveness of such violence. Violence directed against women is found in many societies and takes multiple forms, including physical and sexual abuse, mutilation, and murder. Data from the World Health Organization (2021) indicate that almost a third of all women around the world have been abused in some way by intimate partners and that abuse from intimate partners is the most prevalent type of violence against women. Same-sex and transgender couples are not immune to intimate partner violence (IPV), with studies generally showing same-sex couples' rates of IPV aren't markedly different from those of heterosexual couples (Rollè et al., 2018), yet transgender couples' rates are considerably higher (Peitzmeier et al., 2020).

Rape is a specific and all-too-common subtype of violence against women and refers to the forcing of nonconsensual vaginal, oral, or anal intercourse. One in five women worldwide will be a victim of rape or attempted rape in her lifetime; this rate is the same for women in the United States (CDC, 2010). The vast majority of rapes are committed by men against women, although mounting evidence suggests that men are also victims of sexual assault, and gay and transgender men are particularly vulnerable. Early research documented cases in which women take sexual advantage of young men who may be insecure, intoxicated, or of a lower status (Anderson & Struckman-Johnson, 1998). More recent data from the CDC (2010) found that 16 percent of men have experienced sexual assault by age 18, often at the hands of a relative or acquaintance. Although all sexual assault is taboo, young men are particularly reluctant to come forward and report their experiences. Many feel stifled because they have internalized the belief that men should be strong, stoic, and able to defend themselves, while those assaulted by other men fear the stigma associated with sex between two men (Kassie, 2015). Black men, in particular, may feel compelled to conceal their experiences of sexual victimization, given pressures to conform to a masculine ideal and their belief that authorities would be reluctant to believe or support them (Curry, 2019).

Rape is an act of violence committed to wield power and control over its victim. Sexual assault is often carefully planned, rather than performed on the spur of the moment to satisfy some uncontrollable sexual desire. Many rapes involve beatings, knifings, and even murder. In some

instances, sexual assault is facilitated by alcohol or drinks spiked with "date-rape" drugs, including the sedative Rohypnol (i.e., "roofies") (Michigan Department of Community Health, 2010). Even when rape leaves no physical wounds, it is a highly traumatic violation of the victim's person that leaves long-lasting psychological scars. This devastation was recounted in vivid and heart-breaking terms by a young woman who was sexually assaulted while unconscious by a Stanford University student-athlete. At the assailant's sentencing, the woman read a letter in which she shared, "I can't sleep alone at night without having a light on, like a five year old, because I have nightmares of being touched where I cannot wake up. I did this thing where I waited until the sun came up and I felt safe enough to sleep. . . . It is embarrassing how feeble I feel, how timidly I move through life, always guarded, ready to defend myself, ready to be angry."

It is difficult to know how many rapes actually occur because many rapes go unreported. In one comprehensive study of American sexual behavior, 22 percent of the women surveyed reported having been forced into a sexual encounter. Yet the same study found that only 3 percent of the men admitted to having forced a woman into sex, a discrepancy that the study's authors attribute to men and women's different perceptions regarding what constitutes forced sex (Laumann et al., 1994). The CDC estimates that over half of women experience sexual violence involving physical contact (CDC, 2022b).

Although media reports sensationalize "stranger rapes," most rapes are committed by relatives (fathers, stepfathers, brothers, uncles), partners, or acquaintances. Among college students, most rapes are committed by boyfriends, former boyfriends, or classmates (U.S. Bureau of Justice Statistics, 2017). The National Institute of Campus Sexual Assault study presents a chilling picture of violence against women on campuses across the country (Krebs et al., 2007). The study, conducted during the winter of 2006, asked college women about their experience with rape, attempted rape, coerced sex, and unwanted sexual contact. More than 3 percent (3.4 percent) of female students surveyed reported having been raped since entering college. A previous study conducted by the same organization found that for both completed and attempted rapes, 9 out of 10 offenders were known to the victim.

The incidence of other forms of victimization reported in the study was substantially higher than that of rape. Overall, 29 percent of female

students reported having experienced attempted or completed sexual assault (Krebs et al., 2007). Moreover, nearly 16 percent of the women reported being victimized by attempted or completed sexual assault before they entered college (19 percent since the beginning of their college career).

Gender-based violence—both sexual and nonsexual—against transgender women and nonbinary persons, especially transgender women of color, has escalated in recent years at an alarming level. In 2021, the Human Rights Campaign tracked an all-time annual high of 50 transgender people fatally shot or killed by other violent means. It reported that 50 is almost certainly a low estimate, because aggressions against transgender persons often go unreported or are misreported. In most years, the majority of these victims are Black and Latinx transgender women (Powell, 2021). A range of reasons are given for this violence, including the persistent stigmatization of sexual and gender minorities, and a cultural, political, and legal context that is increasingly hostile to persons who defy the gender binary (Wirtz et al., 2020).

## Why Does Violence Persist? Competing Perspectives

Some early radical feminist scholars claimed that men are socialized to regard women as sex objects and that this partly explains the high levels of victimization of women (Dworkin, 1987; Griffin, 1979). Susan Brownmiller (1975), for example, claimed that the constant threat of rape contributes to a “rape culture” in which male domination fosters a state of continual fear in women. One aspect of a rape culture is male socialization to a sense of sexual entitlement, which may encourage sexual conquest and promote insensitivity to the difference between consensual and nonconsensual sex (Scully, 1990). From seemingly innocent high school locker room jokes, to television commercials depicting women as sexually inviting, to television and movie images equating masculinity with the conquest of women, many men learn to believe that women exist for their pleasure. Under such circumstances, rape is all too “normal” (Wolf, 1992).

Emma Sulkowicz, a student at Columbia University, carried a 50-pound mattress around campus in protest of the university's handling of her sexual assault case.

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Moreover, female survivors of sexual assault often are victimized again by judges, community members, and a mass media that subtly or overtly holds women "responsible" for their sexual victimization. In her victim impact letter, the woman at the center of what came to be called the "Stanford rape case" recounted, "I was pummeled with narrowed, pointed questions that dissected my personal life, love life, past life, family life, inane questions, accumulating trivial details to try and find an excuse for this guy who had me half naked before even bothering to ask for my name."

The fact that "acquaintance rapes" occur suggests that some men feel entitled to sexual access if they already know the woman. In a survey of nearly 1,300 Americans, 38 percent of men indicated that they believe sex is acceptable within the first month of dating. Only 20 percent of women agreed (Ballard, 2021). And unlike victims of other interpersonal crimes such as muggings or robberies, rape victims are uniquely vulnerable to being blamed for their attacks (Gravelin et al., 2018).

Because some men are socialized to feel sexual entitlement, rape is most common in times and places where men believe that norms condemning rape do not apply—for example, in times of war. Indeed, war-related

rapes are as old as human history. Followers of Rome's legendary founder, Romulus, were reputed to have captured and raped Sabine women to populate Rome. Japanese soldiers raped as many as 20,000 women when they conquered the city of Nanking in China in 1937 (Chang & Kirby, 1997). American soldiers committed rapes during the U.S. Civil War and the Vietnam War.

Rape is an especially potent instrument of war, since it dehumanizes the victims and—where sexual mores are highly restrictive—can break apart families and weaken the resolve of victims to resist their aggressors. David Rosen (2008), a professor of sociology and anthropology who has long studied war crimes in Africa, argues that the systematic rape of women by armed militias in Darfur was intended to destroy their communities and ultimately serve as a means of ethnic cleansing. A study of rape in ethno-national conflicts supports this conclusion; it reports that rape is far more likely when the future existence of the state is threatened (Hayden, 2000).

During World War II, for example, Japanese soldiers forced as many as 200,000 young women and girls to serve as "comfort women" for Japanese troops. These women—mainly Korean but also taken from other Asian countries conquered by the Japanese—were forced to work as sex slaves in military brothels throughout the Pacific. Many died in captivity; others committed suicide (Stetz & Oh, 2001). Rape was widely used as a Serbian strategy in the wars in Kosovo and Bosnia in the 1990s. By systematically raping and impregnating Muslim women, the Serbian forces hoped to humiliate the Muslim population into fleeing their homelands (Allen, 1996). Similarly, rape is used as a weapon of war in the Congo, where groups of armed rebels rape women and children to humiliate them and their families—a context that journalist Nicholas Kristof (2010) has called "the world capital of rape, torture, and mutilation." Russia's violent assault on Ukraine, beginning in February 2022, has been marked by war atrocities including rape, torture, and kidnapping to try to sow terror among Ukrainian civilians. According to a 2022 United Nations report, the rape victims ranged in age from 4 to over 80 years old (UN News, 2022).

Sexual assault is devastating to its victims, yet the consequences are particularly dire for those living in cultures that devalue the sexuality of women and sexual and gender minorities. For example, in their book *Half the Sky*, journalists Nicholas Kristof and Sheryl WuDunn (2009) recount

the harrowing experience of Hawa, a young student living in a refugee camp in Sudan's Darfur region. Hawa was attacked and gang-raped by members of the government-sponsored Janjaweed militia. When her friends attempted to get her medical treatment for her injuries in a small clinic staffed by foreign doctors, local police arrested her. Premarital sexual intercourse is a crime in Sudan. For the police, the act of seeking medical attention constituted proof of Hawa's sexual engagement, and without the required four male witnesses to testify to the rape, she was presumed to be guilty. LGBTQ+ persons who are victims of sexual violence cannot report their attacks for fear of reprisal or even death in the 64 nations worldwide (as of 2022) that criminalize same-sex relations (BBC News, 2023). The death penalty is the legally prescribed punishment for same-sex sexual acts in Brunei, Iran, Mauritania, Saudi Arabia, Yemen, and some northern states of Nigeria. In five countries—Afghanistan, Pakistan, Qatar, Somalia, and the United Arab Emirates—the law is unclear, leaving the door open to apply the death penalty.

Gender-based violence and intimate partner violence remain critical global health issues. However, policy makers are making incremental strides in both drawing attention to and devising policies to fight such violence.

In 2022, President Joseph Biden reauthorized the Violence Against Women Act (VAWA). VAWA, enacted in 1994, created and has since expanded federal programs to assist local communities with law enforcement, and helps victims of domestic/partner abuse and sexual abuse. Important revisions to the reauthorized act include expanded protection of gay men, lesbian women, transgender individuals, Native Americans, and immigrants—all groups particularly vulnerable to victimization. This reauthorized act underscores the importance of recognizing intersectionality not only in scholarship but also in public policies, where the intersections of race, class, sexual orientation, gender identity, and immigrant status may render a person more or less vulnerable to gender-based mistreatment.

At a global level, the United Nations has been instrumental in raising awareness of gender-based violence. In July 2012, the secretary-general's UNiTE to End Violence Against Women campaign rolled out a series of public awareness and education events, which relied on artists and social media to help ensure that schools, workplaces, and cyberspace are safe spaces for women and girls. On the twenty-fifth day of each month,

awareness campaigns, public service announcements, and public art exhibits draw attention to violence against women.

In 2016, the United Nations Human Rights Council adopted a resolution on “protection against violence and discrimination based on sexual orientation, and gender identity.” This was the first official UN resolution to focus exclusively on human rights, sexual orientation, and gender identity, and it was the first formal UN text to mention gender identity. The resolution called on the UN’s high commissioner for human rights to prepare a global study outlining discriminatory laws, practices, and acts of violence directed at LGBTQ+ persons, with recommendations on how to end these fundamental assaults on human rights.

Feminist scholars are pessimistic that inequalities on the basis of sex, gender identity, and sexual orientation, whether pay inequalities or sexual violence, will be eradicated any time soon. However, Kristof and WuDunn (2009) provide insights into ways that these problems might be attacked, slowly and gradually. They describe the eradication of these inequalities as “the paramount moral challenge” of this century, and they believe that the education and financial empowerment of women is a first essential step. A similar recommendation was offered by the United Nations more than a decade ago. On July 2, 2010, in a historic moment, the UN General Assembly voted unanimously to establish the UN Entity for Gender Equality and Empowerment, to be known as UN Women. With the establishment of UN Women, UN Secretary-General Ban Ki-moon said, “Equality for women and girls is not only a basic human right, it is a social and economic imperative. Where women are educated and empowered, economies are more productive and strong. Where women are fully represented, societies are more peaceful and stable” (Fifth World Conference on Women, 2010).

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## CONCEPT CHECKS

1. **Name three possible explanations for the gender pay gap.**
2. **Describe three ways that traditional expectations associated with male gender roles harm men and their families.**
3. **Discuss at least two reasons why women and sexual and gender minorities are so often the targets of gender-based violence.**

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# Glossary

sex segregation
: The concentration of men and women in different occupations.

human capital theory
: The argument that individuals make investments in their own "human capital" to increase their productivity and earnings.

rape
: The forcing of nonconsensual vaginal, oral, or anal intercourse.

# THE BIG PICTURE

# Chapter 10

## Inequality on the Basis of Gender and Sexuality

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**Exercises:** Thinking Sociologically

1. What does cross-cultural evidence from tribal societies in New Guinea, Afghanistan, and North America suggest about the differences in gender roles? Explain.
2. Why are women of color likely to think very differently about gender inequality than White women? Explain.

# BASIC CONCEPTS p. 333

## Learning Objectives

Understand the ways that gender differences reflect biological factors, sociocultural influences, and the complex interplay between the two. Understand the distinctions between sex, gender, gender identity, and sexual orientation.

## Terms to Know

gender binary • gender nonconforming • transgender • intersectionality • sex • gender • intersex • gender identity • cisgender • gender expression • sexual orientation • sexual and gender minority (SGM) • gender role socialization • social construction of gender • hegemonic masculinity • biological essentialism

## Concept Checks

1. What is the difference between sex and gender?
2. How do gender identity and gender expression differ?
3. How do both biology and gender socialization contribute to differences between men and women?
4. What does it mean to say that gender is something we"do"? Give an example of a way you do gender in your daily life.
5. How can studies of gender around the world contribute to the argument that gender is socially constructed?

# SOCIOLOGICAL THEORIES OF GENDER INEQUALITIES p. 344

## Learning Objectives

Recognize and contrast competing explanations for gender inequality.
Learn some feminist theories about gender equality.

## Terms to Know

feminist theory • liberal feminism • radical feminism • patriarchy • Black feminism • transnational feminism • postmodern feminism

## Concept Checks

1. Contrast functionalist and feminist approaches to understanding gender inequality.
2. What are the key ideas of liberal feminism? What are criticisms of this perspective?

3. What are the key ideas of radical feminism? What are criticisms of this perspective?
4. How do the key ideas of socialist feminism challenge the main themes of liberal and radical feminism?
5. Do you think that postmodern feminism is incompatible with liberal, radical, and Black feminist perspectives? Why or why not?

# RESEARCH ON GENDER TODAY: DOCUMENTING AND UNDERSTANDING GENDER INEQUALITIES p. 351

## Learning Objectives

Learn how social structure creates and maintains inequalities on the basis of gender, gender identity, and sexual orientation. Understand how gender is cast as a binary in society and how that contributes to inequality. Learn the forms these inequalities take in social institutions such as the workplace, families, the educational system, and the political system in the United States and globally.

## Terms to Know

gender inequality • gender typing • glass ceiling • sexual harassment

## Concept Checks

1. Do you believe that girls or boys are more disadvantaged in the classroom? Why?
2. Describe at least three examples of how gender inequalities emerge in the workplace. How would a sociologist explain these inequities?
3. How do inequalities in the home, especially with regard to housework and child care, reflect larger gender inequities in society?
4. What are some important differences between men's and women's political participation?

# UNANSWERED QUESTIONS: WHY DO GENDER INEQUALITIES PERSIST? p. 371

## Learning Objectives

Understand how sex segregation contributes to the gender gap in pay, learn about family-leave policies in other countries, explore the effects of gender inequality on cisgender and transgender men, and evaluate the competing explanations for the persistence of gender-based violence.

## Terms to Know

sex segregation • human capital theory • rape

## Concept Checks

1. Name three possible explanations for the gender pay gap.
2. Describe three ways that traditional expectations associated with male gender roles harm men and their families.
3. Discuss at least two reasons why women and sexual and gender minorities are so often the targets of gender-based violence.

# Glossary

gender binary
: The classification of sex and gender into two discrete, opposite, and nonoverlapping forms of masculine and feminine.

gender nonconforming
: Identifying as a gender other than male or female, or not identifying with a particular gender at all.

transgender
: Identifying as or expressing a gender identity that differs from a person's sex at birth.

intersectionality

A sociological perspective that holds that our multiple group memberships affect our lives in ways that are distinct from single group memberships. For example, the experience of a Black woman may be distinct from that of a White woman or a Black man.

sex
: The biological and anatomical differences distinguishing females and males.

gender
: Social expectations about behavior regarded as appropriate for the members of each sex. Gender refers not to the physical attributes distinguishing men and women but to socially formed traits of masculinity and femininity.

intersex
: Describes individuals possessing both male and female genitalia. Although statistically rare, this subpopulation is of great interest to gender scholars.

gender identity
: How individuals see and describe their own gender.

cisgender
: Describes individuals whose gender identity matches their biological sex. Statistically, this is the most common gender. It would include persons born female who identify as female and persons born male who identify as male.

gender expression
: How a person chooses to convey gender identity through behavior, voice, mannerisms, and other external characteristics.

sexual orientation
: An individual's enduring emotional, romantic, or sexual attraction to other people.

sexual and gender minority (SGM)
: The broad label applied to populations that include, but are not limited to, individuals who identify as lesbian, gay, bisexual, asexual, transgender, queer, and/or intersex.

gender role socialization
: The learning of gender roles through social factors such as schooling, the media, and family.

social construction of gender
: The learning of gender roles through socialization and interaction with others.

hegemonic masculinity

Social norms dictating that men should be strong, self-reliant, and unemotional.

biological essentialism

The view that differences between men and women are natural and inevitable consequences of the intrinsic biological natures of men and women.

feminist theory

A sociological perspective that emphasizes the centrality of gender in analyzing the social world and particularly the uniqueness of the experience of women. There are many strands of feminist theory, but they all share the desire to explain gender inequality in society and to work to overcome it.

liberal feminism

The form of feminist theory that posits that gender inequality is produced by unequal access to civil rights and certain social resources, such as education and employment, based on sex. Liberal feminists tend to seek solutions through changes in legislation that ensure that the rights of individuals are protected.

radical feminism

The form of feminist theory that posits that gender inequality is the result of male domination in all aspects of social and economic life.

patriarchy

The dominance of men over women. All known societies are patriarchal, although there are variations in the degree and nature of the power that men exercise as compared with women. One of the prime objectives of women's movements in modern societies is to combat existing patriarchal institutions.

Black feminism

A strand of feminist theory that highlights the multiple disadvantages of gender, class, and race that shape the experiences of non-White women. Black feminists reject the idea of a single, unified gender oppression that is experienced evenly by all women, and argue that early feminist analysis reflected the specific concerns of White, middle-class women.

transnational feminism

A branch of feminist theory that highlights the way that global processes—including colonialism, racism, and imperialism—shape gender relations and hierarchies.

postmodern feminism

The feminist perspective that challenges the idea of a unitary basis of identity and experience shared by all women. Postmodern feminists reject the claim that a grand theory can explain the position of women in society, or that there is any single, universal essence or category of "woman." Instead, postmodern feminism encourages the acceptance of many different standpoints as equally valid.

gender inequality

The inequality between men and women in terms of wealth, income, and status.

gender typing

Women holding occupations of lower status and pay, such as secretarial and retail positions, and men holding jobs of higher status and pay, such as managerial and professional positions.

glass ceiling

A promotion barrier that prevents a woman's upward mobility within an organization.

sexual harassment

Unwanted sexual advances by one individual toward another, in which the first person persists even though it is clear that the other party is resistant.

sex segregation

The concentration of men and women in different occupations.

human capital theory

The argument that individuals make investments in their own "human capital" to increase their productivity and earnings.

rape

The forcing of nonconsensual vaginal, oral, or anal intercourse.

# 11 Race, Ethnicity, and Racism

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Projections by the U.S. Census Bureau suggest that

1. **Latinos will be in the majority in the United States by 2044.**
2. **Whites will no longer be a majority in the United States by 2044.**
3. **Whites will remain in the majority after 2044.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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**LEARNING OBJECTIVES**

1. **Basic Concepts** Understand the differing meanings of the terms *race* and *ethnicity*. Understand why race is a highly contested concept.
2. **Thinking About Racism** Learn several key concepts that are important for understanding racism in the contemporary United States: color-blind racism, White privilege, institutional racism, overt racism, and microaggressions.
3. **Race and Racism in Historical and Comparative Perspective** Familiarize yourself with the history and social dimensions of ethnic relations in the United States. Recognize the importance of the historical roots of ethnic conflict, particularly in the expansion of Western colonialism. Understand the different models for a multiethnic society.
4. **Unanswered Questions** Understand the current state of immigration to the United States. Learn the forms of inequality and oppression experienced by different racial and ethnic groups in the United States.

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In 2016, Donald Trump was elected into office in part by working-class White voters who were largely victims of an economy that had outsourced millions of jobs to other nations and lost others to computerization. Many of these voters blamed their troubles not on economic transformations, however, but instead on the incorrect notion that immigrants and people from racial minority groups were increasingly taking their jobs and controlling the country.

You have no doubt heard the same message that many of these anxious White voters heard in the years leading up to the 2016 presidential election—that the United States is moving in the direction of what is sometimes called a "majority-minority" nation. By this, sociologists mean a country in which non-Hispanic Whites will no longer be in the majority: a nation in which Black, Hispanic, Asian, Native American, and MENA (Middle Eastern and North African) persons will be in the majority. The conventional wisdom, including projections by the U.S. Census Bureau, suggests that this is what is happening. Thus, the answer is *b*: According to the U.S. Census, persons who identify as Whites will no longer be a statistical majority in the United States by 2044.

The Census Bureau is the official U.S. government agency for counting Americans. Ever since 1790, the Census Bureau has classified the

population by race, and the way it has done so powerfully illustrates that race is not a biological reality, but rather a social and political construction. For the first century and a half of the census, these classifications were done by census workers who determined the race of a person by sight. Such classifications, no doubt, were quite arbitrary and often inaccurate. In 1960, the census moved to a system in which the people being counted self-reported their own race by choosing among predetermined categories.

Over the history of the census, the specific racial and ethnic categories used have undergone major changes, demonstrating that categories we take to be natural in one era are actually socially constructed. This concept is illustrated by the way in which categories vary over time. People from South Asia such as those from India or Pakistan were long classified as White in the census, for example, but by the 1980s, were reclassified as Asian. Mexicans were classified as White in the nineteenth century, as non-White in the 1930s, again as White in the 1940s, and then as Hispanic in the 1970s, all depending on demands for labor and the amount of prejudice in the country at a given moment.

**What is your race or ethnicity?**
*Select all that apply* ***AND*** *enter additional details in the spaces below. Note, you may report more than one group.*

☐ **WHITE –** *Provide details below.*

☐ German ☐ Irish ☐ English

☐ Italian ☐ Polish ☐ French

*Enter, for example, Scottish, Norwegian, Dutch, etc.*

☐ **HISPANIC OR LATINO –** *Provide details below.*

☐ Mexican or Mexican American ☐ Puerto Rican ☐ Cuban

☐ Salvadoran ☐ Dominican ☐ Colombian

*Enter, for example, Guatemalan, Spaniard, Ecuadorian, etc.*

☐ **BLACK OR AFRICAN AMERICAN –** *Provide details below.*

☐ African American ☐ Jamaican ☐ Haitian

☐ Nigerian ☐ Ethiopian ☐ Somali

*Enter, for example, Ghanaian, South African, Barbadian, etc.*

☐ **ASIAN –** *Provide details below.*

☐ Chinese ☐ Filipino ☐ Asian Indian

☐ Vietnamese ☐ Korean ☐ Japanese

*Enter, for example, Pakistani, Cambodian, Hmong, etc.*

☐ **AMERICAN INDIAN OR ALASKA NATIVE –** *Enter, for example, Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Tribal Government, Tlingit, etc.*

☐ **MIDDLE EASTERN OR NORTH AFRICAN –** *Provide details below.*

☐ Lebanese ☐ Iranian ☐ Egyptian

☐ Syrian ☐ Moroccan ☐ Israeli

*Enter, for example, Algerian, Iraqi, Kurdish, etc.*

☐ **NATIVE HAWAIIAN OR PACIFIC ISLANDER –** *Provide details below.*

☐ Native Hawaiian ☐ Samoan ☐ Chamorro

☐ Tongan ☐ Fijian ☐ Marshallese

*Enter, for example, Palauan, Tahitian, Chuukese, etc.*

EXAMPLE

In 2023, a U.S. government advisory panel proposed a new question be added to the decennial census that asks respondents to indicate all the races and ethnicities they identify with, along with a new category for those of Middle Eastern or North African descent.

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Today, persons who report that they are of Hispanic or Latino ethnicity, such as those with Mexican or Puerto Rican background, also are required to indicate which racial category they belong to, such as White, Black, Asian, or Native American. However, for many, these categories do not capture how a person identifies. In 2020, fully one in seven Hispanic persons—numbering more than 45 million—indicated their race as "other." For this reason, in 2023 a United States government advisory panel recommended an entirely new single-question approach to assessing race and ethnicity. In this new proposal, people would first check off whether they identify as Hispanic, White, Black, Asian, or so on. Underneath the box indicating their racial identity, they would have the option to check off their ethnicity/ethnicities such as Guatemalan, Dutch, or Nigerian. A decision on this proposed change is expected by 2024.

South Asian and Hispanic persons are not the only groups who feel that their identities are not adequately captured by long-standing census categories. Arab Americans also have raised concerns that they did not have an option to indicate their ethnoracial background and had no choice but to choose "White" even though many are not seen by themselves or others in that way. In response, the 2023 advisory panel recommended adding a Middle East and North Africa (MENA) category to the U.S. Census (Orvis, 2023). This decision also is expected by 2024.

Racial categories themselves also go in and out of fashion, with many of these earlier terms now considered demeaning and derogatory. In the 1890 census, "quadroon" was the racial category for people whose ancestry was one-quarter Black (i.e., those who had one Black grandparent), and "octoroon" was the racial category for people who had one Black great-grandparent and thus were classified as one-eighth Black. Ten years later, those categories were eliminated, and a new all-encompassing "Negro" category was added to the census. In 1970 "Negro or Black" was added to the census, and by 2000 the category was "Black, African American, or Negro." In 2013, the Census Bureau stopped using the category "Negro" because many respondents found it

offensive; an older generation that identified with that term had largely passed on.

According to the current U.S. Census questionnaire, Heidi Nelson Cruz is the only White person in the Cruz household. Some sociologists question whether this reflects the experience of mixed race families.

In 2016, sociologist Richard Alba published an article that challenged conventional wisdom on census classifications of White and non-White. Although individuals can identify as multiracial, indicating more than one race or ethnicity when they complete their census form, the Census Bureau's strategies for analyzing and reporting these data often end up yielding the lowest possible estimate of the non-Hispanic White population. This is because children with one Asian, Hispanic, or Black parent are always counted as a minority. This, according to Alba, is basically an extension of the "one drop" rule that has always classified people as Black if they have some Black ancestry (Alba, 2016).

Consider the example of Senator Ted Cruz of Texas, who is classified as Hispanic since his ancestors came from Cuba. His wife, Heidi Nelson Cruz, is White and blond, and their two children also appear White and blond. Nevertheless, the only person in the Cruz household who would be classified as White by the Census Bureau is Heidi. But what if the United States were to move to the other extreme: to count anyone with one

White parent as White? Under that assumption, Whites would remain three-quarters of the U.S. population by mid-century. This raises an interesting sociological question: Which assumption fits better with the lived experience of people who identify as multiracial?

Four schoolboys represent the "racial scale" in South Africa: Black, Indian, half-caste, and White.

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According to Alba, the household incomes of mixed-race people tend to be closer to the White median income than to that of racial and ethnic minority persons. Likewise, many mixed-race people—such as those who are both Asian and White—tend to self-identify as White. While this tends not to be the case for those with Black ancestry, it is indeed the direction of identification to be found in many other partially White people. Alba also argues that for people who are born to parents from different racial backgrounds, there is a greater tendency to choose a White marriage partner, which means that their children will tend to live in White neighborhoods and identify as White. For all these reasons, Alba argues, many mixed-race people will self-identify with the majority. It is, therefore, a mistake to take it for granted that the United States is becoming a "majority-minority" country.

Alba's ideas are consistent with the sociological understanding of the term *minority* as not simply a numerical category. Many different people would be considered a "minority" in a numerical or statistical sense, such as people with red hair or people who weigh more than 250 pounds, but these are not minorities according to the sociological concept. In sociology, members of a minority group are historically disadvantaged as compared to the dominant group (a group possessing more wealth, power, and prestige) and thus have may some sense of group solidarity. Subjection to prejudice and discrimination usually may heighten feelings of a shared identity or social position.

Members of minority groups, such as Spanish speakers in the United States, often see themselves as distinct from the majority. Although members of minority groups tend to live in certain neighborhoods, cities, or regions of a country, their children often intermarry with members of the dominant group. Thus, future generations that the Census Bureau assumes will identify as minority may not experience the cultural distinctiveness or discrimination that is today associated with the very idea of a minority group.

# Glossary

minority group

A group of people in a given society who, because of their distinct physical or cultural characteristics, find themselves in situations of inequality compared with the dominant group within that society.

# 1 BASIC CONCEPTS

**Understand the differing meanings of the terms *race* and *ethnicity*.**
**Understand why race is a highly contested concept.**

## Race

In your daily life, you have no doubt used the terms *race* and *ethnicity* many times, but do you know what they mean? In fact, defining these terms is very difficult, not least because of the contradiction between their everyday usage and their scientific basis (or absence thereof).

When the Census Bureau asks people to classify themselves, many respondents mistakenly think that humans can be readily separated into biologically different races. Yet, in biological terms, there are no clear-cut races. We therefore define race as a socially constructed category rooted in the belief that there are fundamental differences among humans, associated with phenotype and ancestry (Monk, 2016).

Differences in physical type between groups of human beings arise from population inbreeding, which varies according to the degree of contact between different cultural or social groups. Human population groups are a continuum. The genetic diversity within populations that share visible physical traits is as great as the diversity between them. Thus, the racial differences the Census Bureau recognizes (Black, White, Hispanic) should be understood as physical variations singled out by the members of a community or society as socially significant and meaningful. Differences in skin color are treated as significant, for example, whereas differences in eye color and height are not. Racial categories are always nationally and historically specific (Fredrickson, 2002), and they can vary significantly from place to place.

Some social scientists argue that race is nothing more than an ideological construct whose use in academic circles perpetuates the commonly held belief that it has a basis in reality (Miles, 1993). For this reason, they argue, it should be abandoned. Others disagree, claiming that “race” still has meaning for many people and cannot be ignored. In historical terms, “race” has been an extremely important concept used by powerful social

groups as part of strategies of domination (Spencer, 2014). For example, the contemporary situation of African Americans in the United States cannot be understood without reference to the slave trade, racial segregation, and persistent racial ideologies (Wacquant, 2010). Racial distinctions are more than ways of describing differences; they are also important factors in the reproduction of patterns of power and inequality.

Hence, "race" remains a vital, if highly contested, concept, which sociologists have to explore wherever it is in use. For this reason, you sometimes will come across sociological papers and books that put the word "race" in quotation marks to reflect its unscientific, problematic, but still commonplace usage in society.

# Ethnicity

While the idea of race implies something fixed and biological, ethnicity is a source of identity based on society and culture. Ethnicity refers to a type of social identity related to ancestry (perceived or real) and cultural differences, which become effective or active in certain contexts. Members of ethnic groups see themselves as culturally distinct from other groups in a society, and are seen by those other groups to be so in return. Different characteristics may serve to distinguish ethnic groups from one another, but the most common are language, history or ancestry (real or imagined), religion, and styles of dress or adornment.

The United States is home to a multitude of different ethnic groups (above) In midtown Manhattan, members of the city's Persian community participate in the annual Persian Parade. (below) In Brooklyn, the West Indian Day Parade is a colorful celebration of Caribbean culture.

In the United States, some of the first sociological research took place on ethnic groups such as Italian Americans, Irish Americans, Polish Americans, and German Americans, though the Irish and the Italians were also sometimes thought of as racial groups as well. As the United States has become more diverse, many other races see themselves as composed of distinct ethnicities. East Asians encompass Chinese, Koreans, and Japanese, among many other ethnic groups, while Blacks include West Indians and West Africans, among many others.

Ethnic differences are wholly learned, a point that seems self-evident until we remember how often some groups have been regarded as “born to rule” or “shiftless,” “unintelligent,” and so forth. Indeed, when people use the term *ethnicity*, very often they do so (as with *race*) when referring to inherent characteristics such as skin color or blood ties. Yet there is nothing innate about ethnicity; it is a purely social phenomenon that is produced and reproduced over time.

For many people, ethnicity is central to their individual and group identity, but for others, it is irrelevant, and for still others, it seems significant only during times of conflict or social unrest. Ethnicity can provide an important thread of continuity with the past and is often kept alive through the practice of cultural traditions. For instance, third-generation Americans of Irish descent may proudly identify themselves as Irish American despite having lived their entire lives in the United States.

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**CONCEPT CHECKS**

1. **How do the changing racial categories used in the census help demonstrate that race is socially constructed?**
2. **Explain the difference between ethnicity and race.**
3. **Why are Hispanics and African Americans considered to be minority groups in American society?**

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# Glossary

race
: A socially constructed category rooted in the belief that there are fundamental differences among humans, associated with phenotype and ancestry.

ethnicity
: Cultural values and norms that distinguish the members of a given group from others. An ethnic group is one whose members share a distinct awareness of a common cultural identity, separating them from other groups. In virtually all societies, ethnic differences are associated with variations in power and material wealth. Where ethnic differences are also racial, such divisions are sometimes especially pronounced.

# 2 THINKING ABOUT RACISM

**Learn several key concepts that are important for understanding racism in the contemporary United States: color-blind racism, White privilege, institutional racism, overt racism, and microaggressions.**

## Defining Racism

Racism can be defined in many ways. Just as there are different understandings of what constitutes racism in different national and subnational contexts and historical periods, so there are similar variations in the understanding of racism. Racism can refer to explicit beliefs in racial supremacy, such as the systems established in Nazi Germany, before the civil rights movement in the United States, and under apartheid in South Africa. It can also refer to practices such as stereotyping that keep racial minorities in inferior positions, despite apparent goodwill and beliefs in equality. Two main components of racism are prejudice and discrimination.

### Prejudice and Discrimination

Prejudice refers to opinions or attitudes held by members of one group toward another. These preconceived views are often based on hearsay and are resistant to change even in the face of direct evidence or new information. People may harbor favorable prejudices toward groups with which they identify and negative prejudices against others. Prejudice operates mainly through stereotyping, which means thinking in terms of fixed and inflexible categories. Stereotyping is often closely linked to the psychological mechanism of displacement, in which feelings of hostility or anger are directed against objects that are not at the root of those feelings. Stereotyping leads people to blame scapegoats for problems that are not their fault. Scapegoating is common when two deprived ethnic groups compete with one another for economic rewards. People who direct racial attacks against poor Mexicans or African Americans, for example, are often in a similar economic position to them. They blame Blacks or Mexicans for grievances whose real causes lie elsewhere.

Scapegoating is normally directed against groups that are relatively powerless because they make for easy targets. Protestants, Catholics, Jews, Italians, racial minorities, and others have played the unwilling role of scapegoat at various times throughout Western history. Scapegoating frequently involves *projection*, the unconscious attribution to others of one's own desires or characteristics. For example, research has consistently demonstrated that when members of a dominant group practice violence against a minority and exploit it sexually, they are likely to believe that the minority group itself displays traits of sexual violence. In the United States, before the civil rights movement, for instance, some White men's ideas about the lustful nature of African American men probably originated in their own frustrations, since sexual access to White women was limited by the formal nature of courtship. Similarly, in apartheid South Africa, Black males were thought to be sexually dangerous to White women—but, in fact, virtually all criminal sexual contact was initiated by White men against Black women (Simpson & Yinger, 1986).

In contrast to prejudice, discrimination refers to actual behavior that denies to members of a particular group resources or rewards that others can obtain. College admissions officers have been known to discriminate against members of ethnic or racial groups when those members do not conform with stereotypes of those groups. One investigation of the Princeton University admissions office, for example, uncovered a rejected Hispanic applicant with this comment written on her file: "Tough to see putting her ahead of others. No cultural flavor in app." Such attitudes are racist when they function to keep Hispanics out of college or ensure that only certain "kinds" of Hispanics will gain access to institutions of higher learning.

# Racism in the United States Today

Some people see racism as a system of domination operating in official social institutions like admissions offices or police departments, while others see it as operating through the actions of racist individuals. In this section, we detail several particular concepts that are important for understanding racism in the United States today: color-blind racism, White privilege, institutional racism, overt racism, and microaggressions.

## Color-Blind Racism: Racism Without Racists

Over the past several decades, some sociologists have argued that racial inequality is maintained less by overt acts of racial hatred than by color blindness itself. Sociologist Eduardo Bonilla-Silva (2006) defines color blindness as a means of maintaining racial inequality without appearing racist.

First, many Whites believe they are above racism and incapable of perpetuating discrimination. They are thus unaware of the ways in which their insensitivity is psychologically damaging to racial minorities. Second, by attempting to act as if race does not exist, they perpetuate inequalities that can only be addressed by explicit attention to racial differences. Third, many Whites who do make subtle or even explicitly racial distinctions have become adept at maintaining an appearance of neutrality. In all these ways, much of racial inequality is maintained through the appearance of color-blind processes.

**White Privilege** One significant aspect of color blindness is how much Whites can take for granted. Many of those who profess to be "color-blind," for example, don't recognize the many ways that they benefit from their Whiteness. Just as many Blacks must take it for granted that racism pervades all actions in a systemic way, so it is that many Whites can take for granted that they will benefit from White privilege. White privilege refers to the unacknowledged and unearned assets that benefit Whites in their everyday lives. It manifests itself in the most taken-for-granted conditions of everyday life.

In a powerful metaphor, women's studies scholar Peggy McIntosh (1988) likens White privilege to "an invisible weightless knapsack of special provisions, assurances, tools, maps, guides, codebooks, passports, visas, clothes, compass, emergency gear, and blank checks." McIntosh then goes on to unpack this invisible knapsack by detailing more than 40 "special circumstances and provisions" she experiences as a White person that her African American counterparts cannot similarly expect in their day-to-day lives. These experiences include the following:

1. Make arrangements to hang out with people of one's own race most of the time.

2. Rent or purchase housing in an area one can afford and where one wants to live.
3. Assume that the people living next door will treat one with respect.
4. Go shopping alone without being followed around the store or harassed.
5. Turn on the TV and expect to see mainly people of one's own race represented on screen most of the time. (1988)

## Institutional Racism

The idea of institutional racism was developed in the United States in the late 1960s by Black Power activists Stokely Carmichael and Charles Hamilton before it was taken up and developed by sociologists in the 1970s. It is defined as the idea that racism occurs through the respected and established institutions of society rather than through the hateful actions of some bad people—that racism pervades all of society's structures in a systematic way. Those who focus on institutional racism study how social institutions, such as schools, hospitals, police departments, and businesses, have practices supporting White supremacy built into the very fabric of their operations. These institutions structure social relations in ways that are less obvious than overt discrimination.

Hundreds of Brooklyn residents gathered downtown to protest the killing of George Floyd by a Minneapolis police officer. Over 2,000

American cities joined in protest in the weeks following Floyd's murder.

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The concept of institutional racism is illustrated tragically by the case of George Floyd. His death at the hands of a police officer on May 25, 2020, led to massive protests, riots, and calls for justice and police reform not only in Minneapolis, the site of the incident, but across the United States and even the world. The murder occurred after Floyd, a 46-year-old African American and frequent patron of Cup Foods, a local grocery store, paid for cigarettes with what was allegedly a fake $20 bill. One of the police officers called to the scene put a gun to Floyd's head until he placed both hands on the car's steering wheel. Videos made by witnesses showed officer Derek Chauvin then dragging a handcuffed Floyd out of the passenger seat and onto the ground, belly down. Chauvin set his knee over Floyd's head and neck while two other officers held his back and legs, as the fourth watched. Despite Floyd's protestations that he couldn't breathe, Chauvin kept his knee in place for nearly another two minutes. Eventually an ambulance arrived, and Floyd's body was removed. An hour later he was pronounced dead at Hennepin County Medical Center.

Chauvin was found guilty of unintentional second-degree murder, third-degree murder, and second-degree manslaughter and was sentenced to 221/2 years in prison. Following the verdict, Bridgett Floyd, Floyd's sister and founder of the George Floyd Memorial Foundation, told reporters that Chauvin's sentence was a signal that police brutality against Black men is "finally being taken seriously" (Chavez, 2021). However, the other three officers involved in Floyd's death received shorter prison terms: J. Alexander Kueng was sentenced to 3 years, Tou Thao to 3.5 years, and Thomas Lane to 2 years.

The tragedy of George Floyd, unfortunately, is not an isolated incident. Breonna Taylor, Corey Jones, Elijah McClain, and dozens of other Black persons have been murdered by police or have died in police custody in recent years. One study by sociologists found that Black men face about a 1 in 1,000 chance of being killed by police over their lifetime—compared to just a 1 in 33,000 chance for all women (Edwards et al., 2019) Data also consistently show that Blacks are far more likely than Whites to be maltreated by police. One national survey found that nearly half (41 percent) of Black Americans say they have been stopped or detained by police because of their race. Furthermore, 20 percent of Black Americans

(and 30 percent of Black men) report that they have been a victim of police violence. In stark contrast, just 3 percent of Whites and 8 percent of Hispanics report similarly negative interactions with police over their lifetimes (Kaiser Family Foundation, 2020).

What we can see in George Floyd's killing and others like it is that discrimination often occurs through the practices of respected institutions. While some observers attribute police officers' murders of African Americans to "a few bad apples," sociologists like Rashawn Ray (2020) counter that "bad apples come from rotten trees"—or law enforcement agencies that are sites of institutional racism. A 2023 Department of Justice investigation of the Minneapolis Police Department (MPD) similarly concluded that institutional racism in the department contributed to Floyd's murder. As the report boldly stated, "Our federal investigation focused on the police department as a whole, not the acts of any one officer. To be sure, many MPD officers do their difficult work with professionalism, courage, and respect. Nevertheless, our investigation found that *the systemic problems in MPD* made what happened to George Floyd possible" (U.S. Department of Justice & U.S. Attorney's Office, 2023; italics added).

The Department of Justice arrived at this conclusion after reviewing thousands of documents, incident files, body camera videos, and data from both the MPD and the city of Minneapolis. Investigators also participated in police cruiser ride-alongs and conversations with MPD officers, city employees, mental health providers, and community members. Based on this extensive investigation, they observed that MPD unlawfully discriminates against Black and Native American people in its enforcement activities. They also detected "persistent deficiencies" in MPD's accountability systems, training, supervision, and officer wellness programs.

Institutional racism extends far beyond the MPD and policing in general. It can corrode nearly every other type of institution, from school systems to health care. One of the best ways to understand how race and ethnicity operate in the United States through institutional racism is to recall that, until the late 1970s, most Black Americans lived in either urban ghettos or Southern states that were still marked by the remnants of Jim Crow segregation. In the urban areas marked by ghettos, it was very difficult for Blacks to find housing outside these neighborhoods, due to either racial discrimination or violence against Blacks who tried to move into

White neighborhoods. In the South, long after the Civil War, there was still a sharp "color line" that separated the races in schools, housing, and public facilities. In both the North and the South, Blacks of all socioeconomic classes led lives that were separate from Whites. Black Americans in the middle and upper classes were relegated to the same neighborhoods as those in the lower class. In other words, being Black largely defined your life chances.

When we refer to the ghetto of the United States, or to Southern Jim Crow, we are recognizing that racism is embedded in the structures of our political, economic, and social institutions. Even though there are many individual acts of discrimination, the racial system is not first and foremost kept alive by these individual acts. It is kept alive and perpetuated by a larger system of segregation that was established long before those currently affected were even born and that exists independently of individual acts of hatred or prejudice. In fact, once people live in a highly segregated society, it is possible for them to suffer great disadvantage based on their race without ever personally experiencing discrimination on a one-to-one basis.

Although an individual act, George Floyd's murder brought attention to systemic inequalities and discrimination that exist on an institutional level, and it resulted in an outpouring of protests in cities around the world. The impact of these protests was to bring attention to institutional racism not merely in the criminal justice system but in all realms of life, including education, housing, and the workplace. Indeed, the murder of George Floyd had the effect of taking a concept developed in the discipline of sociology and making it a part of mainstream discourse about racial inequality around the world.

## Overt Racism: Racism With Racists

Though color-blind racism and White privilege are useful concepts for explaining racial inequality in an age when people are good at keeping their racist thoughts to themselves, it would be a mistake to conclude that overt racist acts have disappeared or that large numbers of people are not victimized by them. In everyday life, racism can be expressed in the ideas held by bigoted individuals. It is expressed overtly through individual attitudes, perceptions, and beliefs, and it is also sustained by the ideological racist statements of political leaders.

Overt racism, which was highly unusual in American politics after the Civil Rights era, saw a resurgence during the campaign and 2016–2020 term of President Donald Trump, and has continued to manifest itself ever since. On June 16, 2015, Trump began his presidential campaign by attacking Mexican migrants to the United States, stating: “When Mexico sends its people, they’re not sending their best. They’re not sending you. They’re sending people that have lots of problems, and they’re bringing those problems with [them]. They’re bringing drugs. They’re bringing crime. They’re rapists. And some, I assume, are good people.” Painting these Mexicans with one broad brushstroke, his rhetoric suggested that most of them were dangerous. It was on this basis that he proposed building a giant border wall between the United States and Mexico. Other recent examples of overt racism include the following:

1. On April 17, 2023, a man spray-painted anti-Semitic insults and swastikas on a synagogue in South Florida. Anti-Semitic incidents—particularly ones involving harassment, vandalism, and assault—increased by 36 percent in 2021–2022, reaching the highest level ever reported in the United States (Anti-Defamation League, 2023).
2. On March 16, 2021, six Asian women working in an Atlanta spa were murdered. After a thorough investigation, the FBI discovered that the perpetrator had a history of making racist statements, and it classified the murders as a hate crime. The killings occurred at a time when the United States was experiencing a 77 percent increase in anti-Asian violence (U.S. Department of Justice, 2023). This increase was attributed to the blame placed on China for the Covid-19 pandemic. In another high-profile incident, an Asian woman’s skull was fractured when she was shoved to the ground in New York City on January 28, 2022. The perpetrator yelled anti-Asian slurs while committing the crime.
3. In May 2020, a Black man bird-watching in New York’s Central Park called out to a White woman to put her dog on its leash. The two began arguing until the man finally said, “Look, if you’re going to do what you want, I’m going to do what I want, but you’re not going to like it,” and began offering the dog some treats. Outraged, the woman grabbed her cocker spaniel, screaming, “Don’t touch my dog!” Thereupon, the man began video recording the altercation on his iPhone, which made the woman shout, “I’m taking a picture and calling the cops! I’m going to tell them there’s an African American man threatening my life!” The man later posted the video, which

went viral and led to the identification of the woman, who was fired from her job at an investment firm. Speaking to CNN, the woman publicly apologized to the man but insisted that she wasn’t racist and had not meant to harm him or the African American community in any way. She admitted, too, that she knew that dogs had to be leashed in that part of the park. Although the man was willing to accept her apology if it was sincere and she promised to restrain her dog in the park henceforth, others were not so easily appeased (Vera & Ly, 2020).

In August 2017, members of White nationalist groups participated in a Unite the Right rally in Charlottesville, Virginia. The rally, which was met by counterprotesters, erupted in violence and ended with 1 woman dead and 19 others injured.

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## Racial Microaggressions

In everyday life, racial minorities often experience brief interactions that send demeaning messages and appear to the victims to be based on their race. Unlike acts of overt racism, these interactions are perpetuated by Whites who are well-meaning and well-intentioned. Whereas the racial minority member experiences the interaction as an insult, the White perpetrator can be shocked to discover there has been any incident at all.

At times, the perpetrator will claim that the minority has misunderstood an “innocent” comment or is making a “mountain out of a molehill.” Often these interactions are experienced silently, with the victim never expressing the outrage they silently feel.

The idea of microaggression was originally proposed in the 1970s by Chester M. Pierce, an African American psychiatrist at Harvard (Dimsdale et al., 1986). In recent years, it has caught on due to the further work of Derald Wing Sue, an Asian American psychologist at Columbia. Racial microaggressions are small slights, indignities, or acts of disrespect that are hurtful to people of color, even though they are often perpetrated by well-meaning Whites. Among the kinds of incidents cited by Sue as examples of microaggressions are people asking Asian Americans where they were born or telling them that they “speak good English.” Such comments suggest that these Americans are immigrants, even when they and their families have been in this country for generations (Sue, 2010).

While the idea of microaggression has become very popular, it has also been widely criticized. Some believe the idea of microaggression is itself damaging because it encourages a victim mentality, spurs anger, and encourages people to jump to negative conclusions in ambiguous situations. As such, the debate over microaggression has become part of the phenomenon itself, an essential component to thinking about the phenomenon of racism in contemporary society.

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**CONCEPT CHECKS**

1. **In what ways does the killing of George Floyd at the hands of a Minneapolis police officer provide evidence of institutional racism?**
2. **How does color blindness maintain racial inequality?**
3. **Provide one example of White privilege. What does McIntosh mean by “an invisible weightless knapsack”?**
4. **What is microaggression? Why is this idea problematic to some?**

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**Table 11.1APPLYING SOCIOLOGY TO RACE AND ETHNICITY**

| CONCEPT | APPROACH TO RACE AND ETHNICITY | CURRENT APPLICATION |
| --- | --- | --- |
| **White privilege** | Unacknowledged and unmerited assets that benefit Whites in their everyday lives. | Whites can typically expect to go shopping without being followed around a store or harassed. |
| **Institutional racism** | Racism that occurs under the auspices of respected civic and social institutions such as courts and police, rather than through the hateful or biased actions of particular prejudiced people. | Police stop and search Black drivers at stop signs twice as often as they do White ones, though Blacks are 26 percent less likely to be found in possession of contraband goods. |
| **Overt racism** | Racism that is manifest in individual attitudes, perceptions, and beliefs, including statements made by political leaders. | Donald Trump initiated his 2016 presidential campaign with the accusation that Mexican migrants to the United States are “rapists and criminals.” |

| CONCEPT | APPROACH TO RACE AND ETHNICITY | CURRENT APPLICATION |
|---|---|---|
| **Racial microaggressions** | Subtle, slight indignities and disrespectful actions that are hurtful to people of another race even though they are often perpetrated by well-meaning individuals. | Members of ethnic and racial minority groups are often asked where they were born under the assumption that they and their families have not been in the United States for long. |

# Glossary

racism
: The attribution of characteristics of superiority or inferiority to a population sharing certain physically inherited characteristics. Racism is one specific form of prejudice, focusing on physical variations among people. Racist attitudes became entrenched during the period of Western colonial expansion, but seem also to rest on mechanisms of prejudice and discrimination found in human societies today.

prejudice
: The holding of preconceived ideas about an individual or group, ideas that are resistant to change even in the face of new information. Prejudice may be either positive or negative.

stereotyping
: Thinking in terms of fixed and inflexible categories.

scapegoats
: Individuals or groups blamed for wrongs that were not of their doing.

discrimination
: Behavior that denies to the members of a particular group resources or rewards that can be obtained by others. Discrimination must be

distinguished from prejudice: Individuals who are prejudiced against others may not engage in discriminatory practices against them; conversely, people may act in a discriminatory fashion toward a group even though they are not prejudiced against that group.

White privilege
: The unacknowledged and unearned assets that benefit Whites in their everyday lives.

institutional racism
: The idea that racism occurs through the respected and established institutions of society rather than through hateful actions of some bad people.

racial microaggressions
: Small slights, indignities, or acts of disrespect that are hurtful to people of color even though they are often perpetrated by well-meaning Whites.

# 3 RACE AND RACISM IN HISTORICAL AND COMPARATIVE PERSPECTIVE

**Familiarize yourself with the history and social dimensions of ethnic relations in the United States. Recognize the importance of the historical roots of ethnic conflict, particularly in the expansion of Western colonialism. Understand the different models for a multiethnic society.**

It is impossible to understand ethnic and racial divisions today without considering the effect of Western colonialism on the rest of the world (Global Map 11.1); global migratory movements resulting from colonialism helped create ethnic divisions by placing peoples in close proximity.

From the fifteenth century onward, Europeans ventured into seas previously uncharted and unexplored by them, pursuing exploration and trade but also conquering native peoples and settling in new areas. Europeans also occasioned a large-scale movement of people from Africa to the Americas via the slave trade. The following extraordinary shifts in population have occurred in the past 350 years or so:

Global Map 11.1

**COLONIZATION AND ETHNICITY**

This map shows the massive movement of peoples from Europe who colonized the Americas, South Africa, Australia, and New Zealand, resulting in the ethnic composition of populations there today. People from Africa were brought to the Americas to be enslaved.

1. **Europe to North America.** Since the seventeenth century, some 45 million people have emigrated from Europe to what are now the United States and Canada. About 200 million people in North America today trace their ancestry to this migration.
2. **Europe to Central and South America.** About 20 million people, mostly from Spain, Portugal, and Italy, have migrated to Central and South America. Some 50 million people in these areas today are of European ancestry.
3. **Europe to Africa and Australasia.** Approximately 17 million people in Africa and Australasia are of European ancestry. In Africa, the majority of emigrants went to the state of South Africa, which was colonized mainly by the British and the Dutch.
4. **Africa to the Americas.** Starting in the sixteenth century, about 10 million Blacks were unwillingly transported to the North and South American continents. Fewer than 1 million arrived in the sixteenth

> century, some 1.3 million in the seventeenth century, 6 million in the eighteenth century, and 2 million in the nineteenth century.

These population flows underlie the current ethnic composition of the United States, Canada, the countries of Central and South America, South Africa, Australia, and New Zealand. In all these societies, the Indigenous populations were decimated by disease, war, and genocide, and subjected to European rule. They are now impoverished ethnic minorities. Because the Europeans themselves had diverse national and ethnic origins, they transplanted ethnic hierarchies and divisions to their new homelands. At the height of the colonial era, Europeans also ruled over native populations in South Asia, East Asia, the South Pacific, and the Middle East.

A young girl joins members of the Ku Klux Klan at a demonstration against the Martin Luther King Day holiday in Pulaski, Tennessee.

Throughout European expansion, ethnocentric attitudes caused many colonists to believe that, as Christians, they were on a civilizing mission to the rest of the world. Europeans of all political persuasions believed themselves superior to the peoples they colonized and conquered. The fact that many of those peoples possessed technologies, agricultural skills, and knowledge that the Europeans embraced and incorporated (for example, the civil service system in India) seemed irrelevant, because the Europeans possessed the power to institutionalize their interpretation of the relationship between themselves and the rest of the world. The early period of colonization coincided with the rise of scientific racism, or the misuse of science to support racist assumptions, and ever since then, the legacy of colonization has generated ethnic divisions that have affected regional and global conflicts. In particular, racist views distinguishing the descendants of Europeans from those of Africans became central to European racist attitudes.

# The Rise of Racism

Why has racism flourished? There are several reasons. The first reason lies in the exploitative relations that Europeans established with the peoples they conquered. The slave trade could not have persisted had Europeans not constructed a belief system that allowed them to justify their actions by claiming that Africans belonged to an inferior race. Racism helped justify colonial rule over non-Whites and denied them the rights of political participation being won by Whites in the colonists' European homelands. The relations between Whites and non-Whites varied according to different patterns of colonial settlement and were influenced by cultural differences among Europeans themselves.

Second, an opposition between the colors White and Black as cultural symbols was deeply rooted in European culture. White had long been associated with purity and Black with evil. (There is nothing natural about this symbolism; in some other cultures, it is reversed.) The symbol of Blackness held negative meanings *before* the West came into extensive contact with Black peoples. These symbolic meanings influenced the Europeans' reactions to Blacks when they first encountered them on African shores. The sense that there was a radical difference between Black and White peoples, combined with the "heathenism" of the Africans, led many Europeans to regard Blacks with disdain and fear.

A third factor was the invention and diffusion of the concept of race itself. Racist attitudes have existed for thousands of years. In China in 300 B.C.E., for example, we find descriptions of barbarian peoples "who greatly resemble monkeys from whom they are descended." But the notion of race as a cluster of inherited characteristics comes from European thought. Count Joseph Arthur de Gobineau (1816–1882), sometimes called the father of modern racism, proposed that three races exist: White, Black, and yellow. The White race possessed superior intelligence, morality, and willpower, and these inherited qualities underlay the spread of Western influence across the world. Blacks were the least capable, marked by an animal nature, a lack of morality, and emotional instability.

The ideas of Gobineau and other similar views were presented as supposedly scientific theories. Although completely without factual value, the notion of the superiority of the White race remains a key element of White racism—in the ideology of the Ku Klux Klan, for example—and was the basis of apartheid in South Africa.

# Blacks in the United States

By 1780, there were nearly 4 million people enslaved in the American South. Enslaved people had no legal rights whatsoever. But they did not passively accept the conditions their masters imposed on them. The struggles of enslaved Africans sometimes took the form of direct opposition or disobedience to orders, and occasionally rebellion, though collective slave revolts were more common in the Caribbean than in the United States. On a more subtle level, their response involved a cultural creativity—a mixing of aspects of African cultures, Christian ideals, and cultural threads from their new environments. Some of the art forms they developed—for example, jazz—were genuinely new.

Hostility toward Blacks on the part of Whites was in some respects stronger in states where slavery had never existed than in the South itself. As the French political observer Alexis de Tocqueville noted in 1835, "The prejudice of race appears to be stronger in the states that have abolished slavery than in those where it still exists; and nowhere is it so intolerant as in those states where servitude has never been known." Moral rejection of slavery was confined to a few more educated groups.

The main factors underlying the Civil War were political and economic; most Northern leaders were more interested in sustaining the Union than in abolishing slavery, although the abolition of slavery was an eventual outcome of the conflict. The formal abolition of slavery barely changed the real conditions of life for African Americans in the South. The "Black codes"—laws limiting the rights of Blacks—restricted the behavior of the formerly enslaved and punished their transgressions in much the same way they had suffered under slavery. Acts legalizing segregation of Blacks from Whites in public places were passed. One kind of slavery was thus replaced by another: that of social, political, and economic discrimination.

## Internal Migration From South to North

Industrial development in the North combined with the mechanization of agriculture in the South produced a progressive movement of African Americans northward. In 1900, more than 90 percent of African Americans lived in the South, mostly in rural areas. Today, three-quarters of the Black population live in Northern urban areas. African Americans used to be farm laborers and domestic servants, but in the course of little more than two generations, they have become mainly urban, industrial, and service-economy workers. But African Americans have not assimilated into the wider society in the way White immigrants did. They still face conditions of neighborhood segregation and poverty that other immigrants faced only upon arrival. Together with those of Anglo-Saxon origin, African Americans have lived in the United States far longer than most other immigrant groups. What was a transitional experience for most of the later White immigrants has become a seemingly permanent experience for Blacks.

## The Civil Rights Movement

In contrast to other racial and ethnic minorities, Blacks and Native Americans have largely been denied opportunities for self-advancement. The National Association for the Advancement of Colored People (NAACP) and the National Urban League were founded in 1909 and 1910, respectively, to promote Black civil rights. However, they did not have a significant effect until after World War II, when the NAACP instituted a campaign against segregated public education. This struggle

came to a head when the organization sued five school boards, challenging the concept of separate but equal schooling. In 1954, in *Brown v. Board of Education of Topeka, Kansas*, the U.S. Supreme Court unanimously ruled that “separate educational facilities are inherently unequal.”

This decision underpinned struggles for civil rights from the 1950s to the 1970s. The strength of the resistance from many Whites persuaded Black leaders that mass militancy was necessary. In 1955, a Black woman, Rosa Parks, was arrested in Montgomery, Alabama, for declining to give up her seat on a bus to a White man. As a result, nearly the entire African American population of the city, led by a Baptist minister, Martin Luther King Jr., boycotted the transportation system for 381 days. Eventually, the city was forced to abolish segregation on public transportation.

Martin Luther King Jr. addresses a large crowd at a civil rights march on Washington in 1963.

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Further boycotts and sit-ins followed, with the objective of desegregating other public facilities. The marches and demonstrations began to achieve a mass following from Blacks and from White sympathizers. In 1963, a quarter of a million civil rights supporters staged a march on Washington and cheered as King announced, “We will not be satisfied until justice

rolls down like the waters and righteousness like a mighty stream.” In 1964, the Civil Rights Act was passed by Congress and signed into law by President Lyndon B. Johnson, banning discrimination in public facilities, education, employment, and any agency receiving government funds. Subsequent bills outlawed discrimination in housing and ensured that African Americans became fully registered voters.

Although civil rights marchers were beaten up and some lost their lives, and in spite of some barriers to full realization of the Civil Rights Act’s provisions, the law was fundamentally important. Its principles applied not just to African Americans but also to anyone subject to discrimination, including other ethnic groups and women. It spurred a range of movements asserting the rights of oppressed groups.

How successful has the civil rights movement been? On one hand, a substantial Black middle class has emerged. Many African Americans—such as the writer Toni Morrison, the literary scholar Henry Louis Gates Jr., former secretary of state Condoleezza Rice, media moguls Oprah Winfrey and Jay-Z, and President Barack Obama—have achieved positions of power and influence. On the other hand, a significant African American underclass remains trapped in the ghettos. Scholars have debated whether this underclass has resulted primarily from economic disadvantage or from dependency on the welfare system. Later in this chapter, we will examine the forms of inequality still experienced by African Americans and other minority groups.

# Hispanics and Latinos in the United States

The wars of conquest that created the boundaries of the contemporary United States were directed not only against the Native American population but also against Mexico. The territory that later became California, Nevada, Arizona, New Mexico, and Utah—along with its quarter of a million Mexicans—was taken by the United States in 1848 as a result of the American war with Mexico. The terms *Mexican American* and *Chicano* refer to the descendants of these people, together with subsequent immigrants from Mexico. The term *Latino* refers to people descended from Latin America, while *Hispanic* tends to refer to anyone living in the United States descended from Spanish-speaking regions.

The four main groups of Hispanics in the United States come from Mexico (around 37.2 million), Puerto Rico (5.8 million), El Salvador (2.5 million), and Cuba (2.4 million). A further 10.4 million Spanish-speaking residents are from countries in Central and South America and other Hispanic or Latino regions (Krogstad et al., 2022). Arizona, Colorado, New Mexico, California, Texas, Florida, New York, and Illinois have the largest Hispanic populations, accounting for nearly two-thirds of all Hispanics (Passel et al., 2022). In 2020, the more than 62 million Hispanics in the United States represented nearly 18.5 percent of the population—up from 4.7 percent in 1970 and 12.5 percent in 2000 (**Figure 11.1**). However, the growth of the Hispanic population has slowed in recent years due to a decrease in immigration as well as declining birth rates among Hispanic women in the United States (Krogstad, 2016).

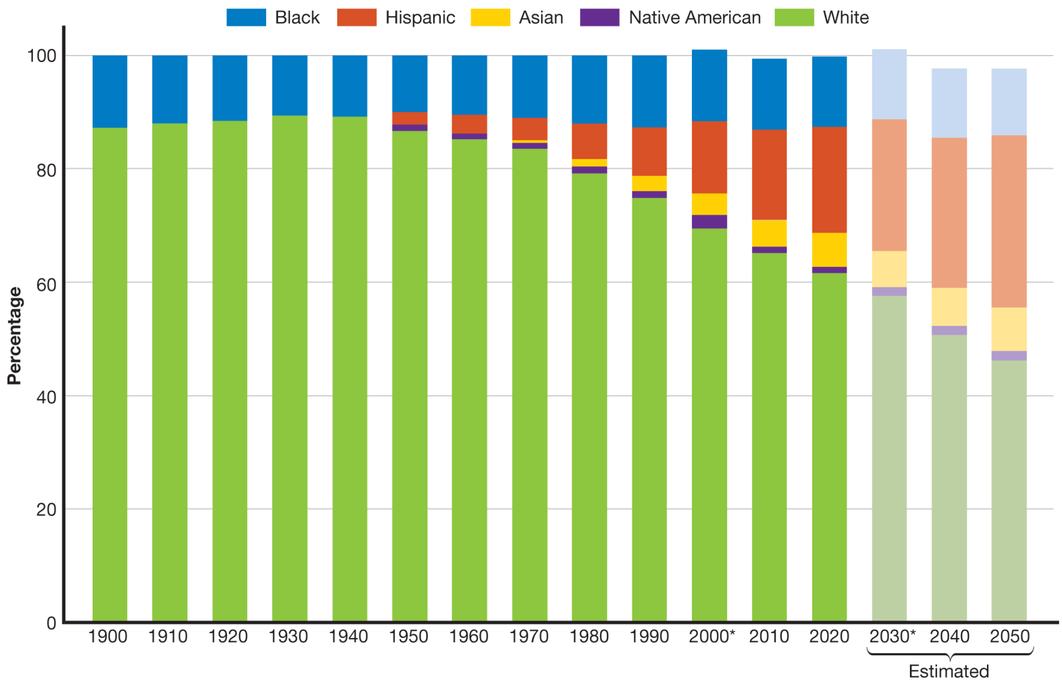
## Mexican Americans

Mexican Americans reside mainly in California, Texas, and other southwestern states, although there are substantial groups in the Midwest and Northern cities as well. The majority work at low-paying jobs. In the post–World War II period up to the early 1960s, Mexican workers were admitted without much restriction. This period was succeeded by a phase of quotas on legal immigrants and deportations of undocumented immigrants. Today, undocumented immigrants continue to cross the border illegally. In 2017, there were an estimated 4.9 million unauthorized Mexican immigrants living in the United States, accounting for about half of all unauthorized immigrants (Lopez et al., 2021). Large numbers are intercepted and sent back each year, but most simply try again.

Because Mexico is a relatively poor neighbor of the wealthy United States, this flow of people northward is unlikely to cease. Undocumented immigrants can be employed more cheaply than native-born workers, and they perform jobs that most of the rest of the population would not accept. Legislation passed by Congress in 1986 has enabled unauthorized immigrants living in the United States for at least five years to claim legal residence. In the past two decades, however, immigration from Mexico has decreased. The growth of the Mexican American population in recent years is due to the increase in U.S.-born Mexican Americans as opposed to new immigration (Krogstad et al., 2022).

Figure 11.1

**RACIAL AND ETHNIC COMPOSITION OF THE UNITED STATES, 1900–2050**




*Total percentage exceeds 100 percent because starting in 2000, respondents were allowed to identify themselves as belonging to more than one racial category.

Sources: U.S. Bureau of the Census, 2004, 2010, 2021b.

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Mexicans in the United States typically have levels of economic well-being and educational attainment far below that of native-born Americans. In 2021, 18 percent of Mexicans lived in poverty. More than two-thirds (74 percent) of Mexicans in the United States are proficient in English; however, only 15 percent hold bachelor's degrees (Moslimani et al., 2023). Many Mexican Americans resist assimilation into the dominant English-speaking culture and increasingly display pride in their own cultural identity within the United States. Social scientists estimate that Mexican immigrants and their children may become increasingly assimilated into life in the United States in coming decades, due in part to policies that help them obtain an affordable college education. Given that about half of undocumented immigrants in the United States hail from

Mexico, these policies will have a major impact on the lives of young Mexican immigrants.

## Puerto Ricans and Cubans

Puerto Rico was acquired by the United States through war, and Puerto Ricans have been American citizens since 1917. The island is poor, and many of its inhabitants have migrated to the mainland United States to seek a better life. Puerto Ricans who emigrated originally settled primarily in New York City, but since the 1960s they have also settled elsewhere. A reverse migration of Puerto Ricans back to the island began in the 1970s. In recent years, however, record numbers of Puerto Ricans have been migrating to the United States to escape the island's decade-long recession. In 2018, the number of Puerto Ricans moving to the United States increased by one-third of the 97,500 migrants from the year before, with 133,500 people coming to the states from Puerto Rico (Glassman, 2019).

One of the most important issues facing Puerto Rican activists is the political destiny of their homeland. Puerto Rico is a commonwealth, not a full state. For years, Puerto Ricans have been divided about whether the island should retain its present status, opt for independence, or attempt to become the fifty-first state. In 2020, 52 percent of voters in Puerto Rico voted in favor of admitting Puerto Rico to the United States. This was the sixth time Puerto Ricans held a nonbinding vote on the issue of statehood. In 2022, the U.S. House of Representatives passed a bipartisan bill, the Puerto Rico Status Act, that would allow the territory to hold a binding vote to officially decide whether it should enter the union. While the bill was unlikely to pass a Senate vote to become law, it served to acknowledge that the status of Puerto Rico must be resolved (Cochrane & Mazzei, 2022).

A third Hispanic group, the Cubans, differs from the others in key respects. Cubans in the United States tend to be more successful compared to other U.S. Hispanic groups: 27 percent of Cubans ages 25 and older have at least a bachelor's degree (compared to 16 percent of all U.S. Hispanics), median annual earnings for Cubans is $28,000 (versus $25,000), and 16 percent live in poverty (versus 19 percent) (Noe-Bustamante et al., 2019). Half a million Cubans fled communism after the rise of Fidel Castro in 1959, and the majority of these settled in

Florida. Unlike other Latino immigrants, most were educated people from white-collar and professional backgrounds. They have thrived within the United States, many finding positions comparable to those they abandoned in Cuba. As a group, Cubans have the highest family income of all Latinos.

A further wave of Cuban immigrants of less affluent origin arrived in 1980 and live in circumstances closer to the rest of the Latino communities in the United States. Both sets of Cuban immigrants are mainly political refugees rather than economic migrants. The later immigrants have become the “working class” for the earlier immigrants. They are paid low wages, but Cuban employers hire them in preference to other ethnic groups.

# Asian Americans

About 6 percent of the population of the United States is of Asian origin. Chinese Americans, Filipino Americans, and Indian Americans form the largest groups, but now there are also significant numbers of Vietnamese, Koreans, Japanese, and Pakistanis. As a result of the war in Vietnam, some 350,000 refugees from that country alone entered the United States in the 1970s. The term *Asian American Pacific Islander* (*AAPI*) is today used to capture the diversity of ethnic experiences originating from a region that includes 75 countries in Asia, as well as several islands in the Pacific Ocean. It is important to make such distinctions rather than thinking of all Asian Americans as a single homogeneous group. One widely shared belief is that Asian Americans are a “model minority” that has somehow managed to overcome prejudice and assimilate into U.S. society, achieving high levels of economic and educational success. Any such achievements are typically attributed to an assumed Asian “work ethic” by which Asian Americans—presumably in contrast with other racial and ethnic groups—are able to thrive in the face of racial and ethnic barriers. Apart from the fact that such a stereotype obscures significant differences among different Asian immigrant groups, it also serves to deny the importance of racism in structuring opportunities for minority groups: If “Asians” can make it, so too can other minority groups—if only they try hard enough. Racism is not the problem (Walton & Truong, 2023; Zheng, 2021).

Young Japanese Americans wait for the baggage inspection upon arrival at a World War II assembly center in Turlock, California, in 1942. From here, they were transported to one of several internment camps for Japanese Americans.

In fact, Asians also experience many structural barriers to advancement, as well as overt racism. The first significant wave of Asian immigrants to the United States consisted of Chinese workers, who came to California during the 1850s, lured—like many White Americans from eastern states—by the gold rush. Most settled in California and worked in agriculture as well as in heavy industries, such as mining and railroad construction: Chinese immigrants built the first transcontinental railroad. They also faced hostility from White Americans, who viewed them as an economic

threat, as well as morally suspect. Violence and lynching were common; the Page Act (1875) and the Chinese Exclusion Act (1882) soon outlawed further Chinese immigration.

The early Japanese immigrants also settled in California and the other Pacific states. During World War II, after the attack on Pearl Harbor by Japan, Japanese Americans in the United States were taken to remote “relocation centers” surrounded by barbed wire and gun turrets. Even though two-thirds of the 120,000 interred Japanese Americans were U.S. citizens, they were compelled to live in the hastily established camps for the duration of the war. (German Americans were not subject to internment, even though Germany was also at war with the United States and its European allies.) Paradoxically, this situation promoted their greater integration within the wider society because, after the war, Japanese Americans did not return to their previously separate neighborhoods. Since then, they have attained high levels of education and income, marginally outstripping Whites. Japanese Americans have the highest rate of intermarriage of U.S. Asian groups: More than half of Japanese newlyweds married a non-Asian partner (Pew Research Center, 2013).

Following the passage of a new immigration act in 1965, large-scale immigration of Asians again took place. Foreign-born Chinese Americans today outnumber those brought up in the United States. The newly arrived Chinese have avoided the Chinatowns in which the long-established Chinese remain.

Despite a more open immigration system, Asians today continue to experience discrimination, and sometimes violence. Covid-19, which originated in Wuhan, China, triggered a significant rise in anti-Asian violence, including vicious attacks on anyone believed to be Chinese. After President Trump used the terms “Chinese virus” or “China virus” in tweets and a press conference on March 19, 2020, one study reported 673 racist incidents (Gover et al., 2020); FBI statistics indicate that hate crimes against Asians increased 167 percent between 2020 and 2021 alone (Li & Lartey, 2023). One large-scale survey reported that nearly half of some 11,500 hate crimes and incidents between March 2020 and March 2022 targeted Chinese people. Nearly three-quarters of those surveyed reported having experienced racial discrimination during the past year, and two-thirds cited a need to be vigilant about the possibility of experiencing a hate crime (Stop AAPI Hate, 2022). Such fears were

reinforced when, as mentioned earlier, six Asian women working in an Atlanta spa were murdered.

# Models of Ethnic Integration

In today's age of globalization and rapid social change, the rich benefits and complex challenges of ethnic diversity are confronting a growing number of states. As international migration accelerates along with the global economy, the mixing of populations will intensify. Meanwhile, ethnic tensions and conflicts continue, threatening the existence of some multiethnic states and hinting at protracted violence in others. How can ethnic diversity be accommodated and ethnic conflict be averted? Within multiethnic societies, what should be the relationship between ethnic minority groups and the majority population? Four primary models of ethnic integration address these challenges: assimilation, the "melting pot," pluralism, and multiculturalism.

For many years, the two most common positive models of political ethnic harmony in the United States were those of assimilation and the melting pot. Assimilation meant that new immigrant groups would assume the attitudes and language of the dominant White community. The idea of the melting pot was different and involved merging different cultures and outlooks by stirring them all together. A newer model of ethnic relations is pluralism, in which ethnic cultures exist separately yet participate in the larger society's economic and political life. A recent outgrowth of pluralism is multiculturalism, in which ethnic groups exist separately and equally. It seems possible to create a society in which ethnic groups are separate and equal, as in Switzerland, where French, German, and Italian groups coexist in the same society. But this situation is unusual, and it is unlikely that the United States will mirror this achievement in the near future.

# Global Migration

Today, floods of refugees and emigrants move restlessly across different regions of the globe, either escaping conflicts or fleeing poverty in search of a better life. Often they reach a new country only to face resentment from people whose forebears were immigrants themselves. Sometimes

there are reversals, as in some areas of the United States along the Mexican border. Much of what is now California was once part of Mexico. Today, some Mexican Americans might say the new waves of Mexican immigrants are reclaiming what used to be their heritage—except that most of the existing groups in California don't quite see things this way.

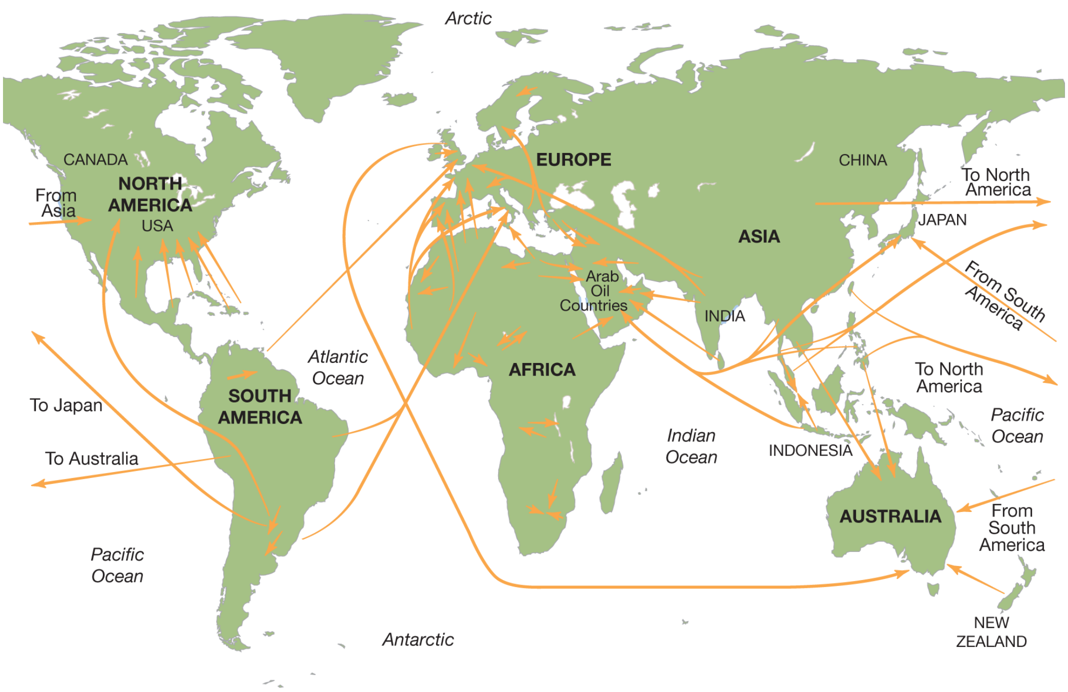
## Migratory Movements

Migration is accelerating as part of the process of global integration. Worldwide migration patterns reflect the rapidly changing economic, political, and cultural ties among countries (Global Map 11.2). It has been estimated that the world's migrant population in 1990 was more than 150 million people. In 2015, the number of migrants was estimated at nearly 244 million, nearly two-thirds of which lived in Europe or Asia (UN Population Division, 2015). In 2017, Europe was home to 61 million migrants, and Asia was home to 106 million migrants, nearly 65 percent of the total international immigrant population at the time (UN Department of Economic and Social Affairs, 2017a). The number will likely continue to increase in the twenty-first century, prompting some scholars to label this the "age of migration" (Castles & Miller, 1993). In fact, the Census Bureau projects that nearly 70 million Americans will be foreign born by 2060 (Vespa et al., 2018).

Immigration, the movement of people into a country to settle, and emigration, the process by which people leave a country to settle in another, combine to produce global migration patterns linking countries of origin and countries of destination. Migratory movements add to ethnic and cultural diversity and affect demographic, economic, and social dynamics. Rising immigration rates in many Western societies have challenged commonly held notions of national identity and have forced a reexamination of concepts of citizenship.

Global Map 11.2

**GLOBAL MIGRATORY MOVEMENTS SINCE 1973**




Note: Arrow dimensions do not indicate the size of movements.

Source: Castles & Miller, 1993.

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Scholars offer four models of migration to describe the main global population movements since 1945. The *classic model* applies to countries such as Canada, the United States, and Australia, which developed as nations of immigrants. These countries have encouraged immigration and promised citizenship to newcomers, although restrictions and quotas limit the annual intake. The *colonial model* of immigration, pursued by countries such as France and the United Kingdom, grants preferences to immigrants from former colonies. Countries such as Germany, Switzerland, and Belgium have followed the *guest workers model*: Immigrants are admitted on a temporary basis, often to fulfill demands within the labor market, but they do not receive citizenship rights, even after long periods of settlement. Finally, *illegal models* of immigration are increasingly common because of tightening immigration laws in many industrialized countries. Immigrants who gain entry into a country either secretly or under a nonimmigration pretense often live illegally, outside the realm of official society. Examples include undocumented Mexican and Central American immigrants in many southern U.S. states and the refugees smuggled across national borders (part of a growing international business).

In recent years the United States has become a major destination for migrants, and Mexico—which shares a 2,000-mile border with the United States—has become a major site of transmigration, in which migrants from other countries first enter Mexico in hopes of making the long journey to the United States (Migration Policy Institute [MPI], 2023a). Fifty years ago, nearly all immigrants crossing the border were Mexican, their numbers peaking at 11.7 million in 2010. But by 2021 the number of Mexican immigrants had declined by a million, while the number of immigrants to the United States from other Latin American countries had grown to more than 11 million. Of that number, 3.8 million came from Central America, including 1.4 million from El Salvador and 1.1 million from Guatemala; 3.3 million came from South America, including nearly 900,000 from Colombia; and more than 4 million came from the Caribbean, the majority from Cuba and the Dominican Republic. These countries have at least two characteristics in common: acute economic hardship affecting their poorest citizens and high levels of violence. Many transmigrated through Mexico, making the 2,000-mile U.S.-Mexican border the world's largest migration corridor (MPI, 2023b).

What are the forces behind global migration, and how are they changing as a result of globalization? Many early theories focused on push-and-pull factors. *Push factors* are dynamics within a country of origin that force people to emigrate, such as war, famine, political oppression, and population pressures. *Pull factors* are features of destination countries that attract immigrants, such as prosperous labor markets, better living conditions, and lower population density.

Recently, push-and-pull theories have been criticized for offering overly simplistic explanations of a multifaceted process. Instead, scholars of migration are regarding global migration patterns as systems produced through interactions between macro-level and micro-level processes. *Macro-level* factors are overarching issues such as the political situation in an area, laws and regulations controlling immigration and emigration, and changes in the international economy. *Micro-level* factors involve the resources, knowledge, and understandings that the migrant populations possess.

The intersection of macro and micro processes is evident in Germany's large Turkish immigrant community. On the macro level are factors such as Germany's economic need for labor, its policy of accepting foreign "guest workers," and the state of the Turkish economy, which prevents

many Turks from earning at a satisfactory level. On the micro level are the informal networks and channels of mutual support within the Turkish community in Germany and the strong links to family and friends in Turkey. Among potential Turkish migrants, knowledge about Germany and its "social capital"—its human or community resources—makes Germany one of the most popular destination countries. Supporters of the migration systems approach emphasize that no single factor can explain the process of migration. Rather, each migratory movement, like that between Turkey and Germany, is the product of an interaction between macro- and micro-level processes.

Stephen Castles and Mark Miller (1993) identified four tendencies that they claim will characterize migration patterns in the coming years:

1. **Acceleration:** Migration across borders is occurring in greater numbers than ever before.
2. **Diversification:** Most countries now receive immigrants of many different types—in contrast with earlier times, when particular forms of immigration, such as labor immigration or refugees, were predominant.
3. **Globalization:** Migration has become more global, involving a greater number of countries as both senders and recipients.
4. **Feminization:** A growing number of migrants are women, making contemporary migration much less male dominated than previously. The increase reflects changes in the global labor market, including the growing demand for domestic workers, the expansion of sex tourism, "trafficking" in women, and the "mail-order brides" phenomenon.

## Global Diasporas

The term diaspora refers to the dispersal of an ethnic population from a homeland into foreign areas, often in a forced manner or under traumatic circumstances. Although members of a diaspora are scattered geographically, they are held together by factors such as a shared history, a collective memory of the homeland, or a common ethnic identity that is nurtured and preserved.

Robin Cohen has argued that diasporas occur in various forms, although the most commonly cited examples are those that result from persecution

and violence. In *Global Diasporas* (1997), Cohen adopts a historical approach and identifies five categories of diasporas: *victim* (e.g., African, Jewish, and Armenian), *imperial* (British), *labor* (Indian), *trade* (Chinese), and *cultural* (Caribbean). In certain cases, such as that of the Chinese, large-scale population movements have occurred on a voluntary basis.

Despite the diversity of forms, all diasporas share certain key features (Cohen, 1997):

- A forced or voluntary movement from a homeland to a new region or regions
- A shared memory about the homeland, a commitment to its preservation, and a belief in the possibility of eventual return
- A strong ethnic identity sustained over time and distance
- A sense of solidarity with members of the same ethnic group also living in areas of the diaspora
- A degree of tension in relation to the host societies
- The potential for valuable and creative contributions to pluralistic host societies

Some scholars have accused Cohen of simplifying complex and distinctive migration experiences into a narrow typology by associating categories of diasporas with particular ethnic groups. Others argue that his conceptualization of diaspora is not sufficiently precise. Yet Cohen's study is valuable for demonstrating that diasporas are nonstatic, ongoing processes of maintaining collective identity and preserving ethnic culture in a rapidly globalizing world.

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## CONCEPT CHECKS

1. **What are three reasons racism has flourished in the United States?**
2. **How did the civil rights movement help minority groups achieve equal rights and opportunities?**
3. **According to Castles and Miller, which four trends are likely to characterize migration in the near future?**
4. **What is a diaspora? Explain the role diasporas play in preserving ethnic culture in contemporary societies.**

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# Glossary

scientific racism
: The use of scientific research or data to justify or reify beliefs about the superiority or inferiority of particular racial groups. Much of the "data" used to justify such claims is flawed or biased.

apartheid
: The system of racial segregation established in South Africa.

assimilation
: The acceptance of a minority group by a majority population, in which the new group takes on the values and norms of the dominant culture.

melting pot
: The idea that ethnic differences can be combined to create new patterns of behavior drawing on diverse cultural sources.

pluralism
: A model for ethnic relations in which all ethnic groups in the United States retain their independent and separate identities yet share equally in the rights and powers of citizenship.

multiculturalism
: A condition in which ethnic groups exist separately and share equally in economic and political life.

immigration
: The movement of people into one country from another for the purpose of settlement.

emigration
: The movement of people out of one country to settle in another.

diaspora
: The dispersal of an ethnic population from an original homeland into foreign areas, often in a forced manner or under traumatic circumstances.

# 4 UNANSWERED QUESTIONS

**Understand the current state of immigration to the United States. Learn the forms of inequality and oppression experienced by different racial and ethnic groups in the United States.**

## Do New Immigrants Help or Hinder the Nation's Economy?

The cultural and social landscape of the United States is viewed as an amalgam of diverse cultures, largely because of our nation's history as a refuge for immigrants. Today, however, policy makers and social scientists disagree over the social and economic costs of immigration.

Hundreds of thousands of people marched in Los Angeles on April 15, 2006, to demand basic rights for immigrants.

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Before discussing this debate, it is important to understand the current state of immigration to the United States. There are more than 44.8 million foreign-born individuals in the United States, constituting 13.7 percent of

the total population (U.S. Bureau of the Census, 2022i). This represents a fourfold increase since 1960, when there were 9.7 million immigrants in the United States (Brown & Stepler, 2016). Each year, more than 1 million immigrants enter the United States (Budiman, 2020). In contrast to the major wave of immigration in the 1880s and 1890s, just 9 percent of the immigrant population today is of European origin. In fact, 53 percent have come from Latin America, including 26 percent from Mexico, and another 30 percent have come from South and East Asia (U.S. Bureau of the Census, 2022j). This change is attributed to two government acts: the 1965 Immigration and Nationality Act Amendments, which abolished preference for northern and western European immigrants and gave preference to "family reunification"—rather than occupational skills—as a reason for accepting immigrants; and the 1986 Immigration Reform and Control Act, which provided amnesty for many illegal immigrants. Since 2010, more Asian immigrants have come to the United States than Hispanic immigrants (Brown & Stepler, 2016). Monthly migration from Mexico has dropped and spiked precipitously in recent years, from around 220,000 migrant encounters at the border in March 2000, down to a low point of around 16,000 in April 2020 when the pandemic struck, and back up to 206,000 in November 2022 after the pandemic (Gramlich, 2023).

People participate in a "We're Here to Stay" event in Washington, D.C., to protest President Trump's immigration policies.

Much of the debate focuses on new immigrants' ability to secure employment and achieve economic self-sufficiency. In his 1994 essay "The Economics of Immigration," economist George Borjas argued that since the 1980s, the United States has attracted "lower-quality" immigrants with less education and few marketable job skills. Moreover, they are less skilled than both natives (i.e., people born in the United States) and earlier migrants; thus, they are more reliant on government assistance. Borjas estimates that recent immigrants will likely earn 20 percent less than native-born Americans for most of their working lives. In terms of the effect of immigrants on natives' economic prospects, Borjas argues that large-scale migration of less-skilled workers harms the economic opportunities of less-skilled natives—particularly African Americans. This occurs because immigrants increase the number of workers in the economy; as they create additional competition in the labor market, wages of the least-skilled workers fall.

Other economists and policy analysts claim that recent immigration has had either a positive effect or no influence on the U.S. economy. Economist Julian Simon (1981, 1989) has argued that immigrants benefit the U.S. economy by joining the labor force and paying into the federal revenue system for their whole lives. By the time they retire and collect government benefits such as Social Security and Medicare, their children will be covering these costs by working and paying into the tax system. Simon's arguments, however, assume that immigrants earn the same wages and are as employable as natives—an assumption refuted by Borjas's research.

Simon also holds that immigrants are a cultural asset to the United States. In fact, he claims that "the notion of wanting to keep out immigrants to keep our institutions and our values pure is prejudice" (quoted in Brimelow, 1995). He argues, moreover, that because human beings have the intelligence to adapt to their surroundings, the more immigrants that come to the United States, the larger the pool of potential innovators and problem solvers our nation will have.

Studies conducted by Simon and the Urban Institute, a nonprofit research organization, acknowledge that although some recent immigrants may benefit from federally funded programs such as welfare, these costs to the government are often quite short-term. Immigrant children who benefit from the U.S. educational system go on to become productive, taxpaying workers.

The National Immigration Forum has estimated that immigrant workers contribute significantly to the national economy. In 2019, foreign-born workers represented around 17.4 percent of the U.S. workforce (U.S. Bureau of Labor Statistics [BLS], 2020b); this includes about 4.6 percent of the workforce who are undocumented immigrants (Radford, 2019). Even though most immigrants work in low-wage and hard-labor jobs, without these workers, the gross domestic product of the United States would be far less. Assessing the fiscal costs of immigration proves difficult, however. Although much of the public debate focuses on the costs of providing services to unauthorized immigrants, actual statistics documenting the number of unauthorized immigrants are difficult to obtain and verify. The Pew Research Center estimates that the population of unauthorized immigrants in the United States was 10.5 million in 2017 (Lopez et al., 2021). Furthermore, few policy analysts can predict whether U.S. immigration policy—or the characteristics of immigrants themselves—will change drastically in the future (Radford, 2019).

# Has Real Progress Been Made Since the Civil Rights Movement of the 1960s?

On the one hand, an increasing number of Blacks joined the middle class by acquiring college degrees, professional jobs, and new homes. On the other hand, Blacks are far more likely than Whites to live in poverty and be socially isolated from good schools and economic opportunity. Also, many immigrants came to the United States throughout the 1980s and 1990s to find new economic opportunity. Yet some of these groups, particularly Mexicans, have among the lowest levels of educational achievement and live in dire poverty. Most sociologists agree on the facts about racial and ethnic inequality but disagree on how to interpret them. Is racial and ethnic inequality primarily the result of a person's racial or ethnic background, or does it reflect a person's class position? In this section, we examine how racial and ethnic inequality is reflected in educational and occupational attainment, income, health, residential segregation, and political power.

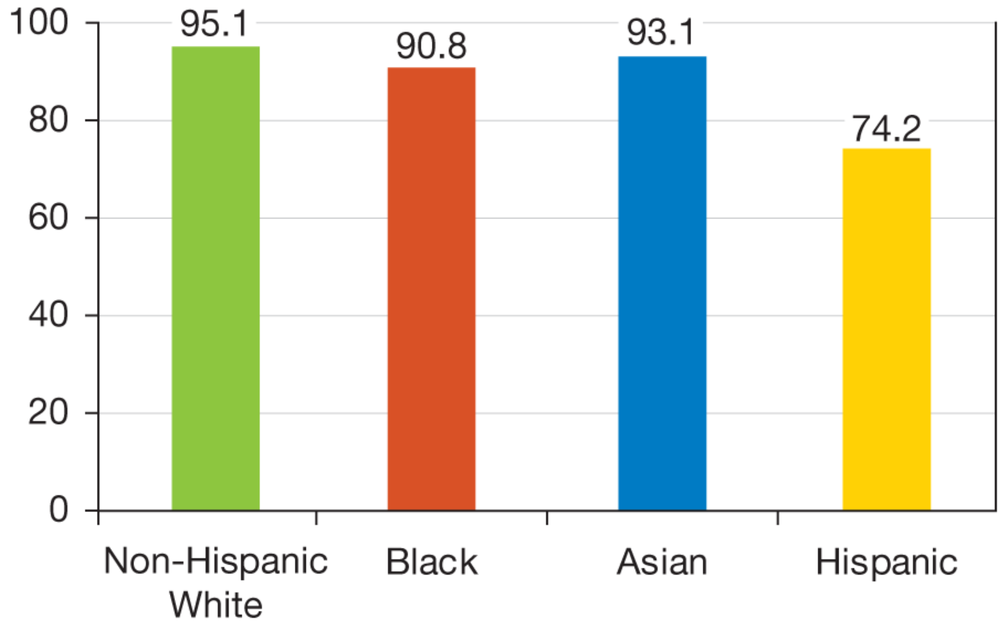
## Educational Attainment

Differences between Blacks and Whites in levels of educational attainment have decreased, but these seem more the result of long-established trends than the direct outcome of the struggles of the 1960s. The U.S. high school

graduation rate reached an all-time high of 87 percent in 2019–2020. Asian/Pacific Islander students had the highest graduation rate at 93 percent, compared to 90 percent for White students, 83 percent for Hispanic students, 81 percent for Black students, and 75 percent for American Indian/Alaska Native students (National Center for Education Statistics [NCES], 2023a). The proportion of Blacks over the age of 25 with high school diplomas increased from about 8 percent in 1940 to about 91 percent in 2021. By contrast, 95 percent of non-Hispanic Whites have completed high school (Figure 11.2, top) (NCES, 2021b).

Figure 11.2

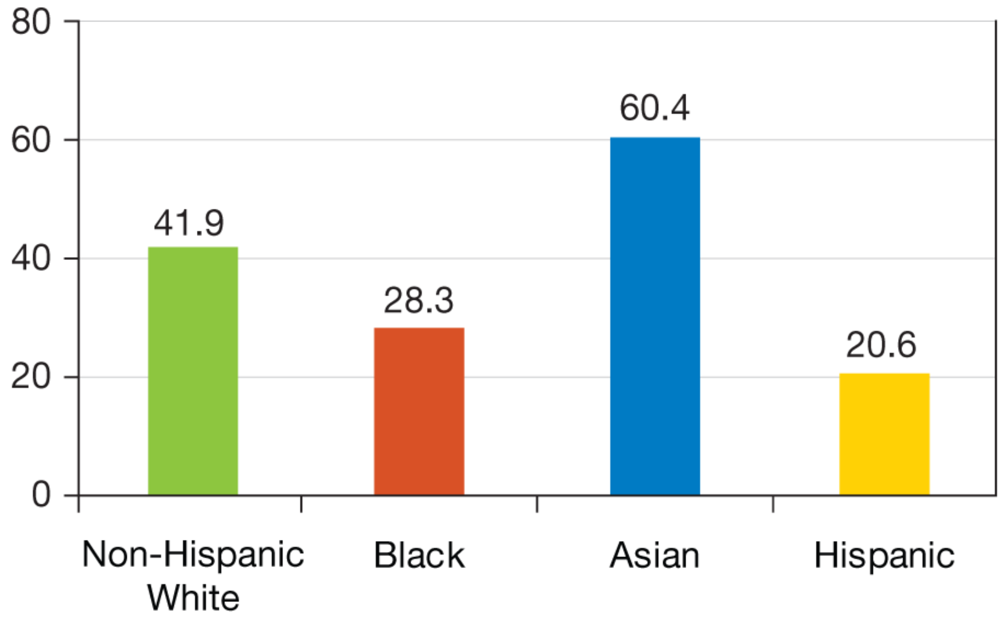
**PERCENTAGE OF POPULATION WITH A HIGH SCHOOI DIPLOMA, 2021***




*25 and older.

Source: NCES, 2021b.

**PERCENTAGE OF POPULATION WITH A BACHELOR'S DEGREE, 2021***




While more Blacks are attending college now than in the 1960s, a much higher proportion of Whites than Blacks have bachelor's degrees (**Figure 11.2**, bottom). In today's global economy and job market, which value college degrees, the result is a wide disparity in incomes between Whites and Blacks (see the next section, "Employment and Income"). Still, the number of bachelor's degrees awarded to Blacks each year has increased considerably—from 2011 to 2021 the percentage of Blacks 25 years or older with a bachelor's degree increased from 19.9 percent to 28.1 percent (U.S. Bureau of the Census, 2022f).

Another trend is the large gap in educational attainment between Hispanics and both Whites and Blacks. While the dropout rate for Hispanic students had been the highest until 2018, in 2021 American Indians/Alaska Natives had the highest percentage of school dropouts (NCES, 2022g). While rates of college attendance and graduation have improved for other groups, the rate for Hispanics has held relatively steady since the mid-1980s. However, from 2011 to 2021 the percentage of Hispanics who hold a bachelor's degree increased from 14.1 percent to 20.6 percent, compared with the increase from 34.0 percent to 41.9 percent for non-Hispanic Whites (U.S. Bureau of the Census, 2022f).

It is possible that these poor results reflect the large number of poorly educated immigrants from Latin America who have come to the United States since the 1980s, many of whom have limited English-language skills and whose children encounter difficulties in school. One study

found, however, that even among Mexican Americans whose families have lived in the United States for three generations or more, there has been a decline in educational attainment (Bean et al., 1994). For Hispanics with low levels of education and poor language skills, living in the United States has been “the American nightmare, not the American dream” (Holmes, 1997).

In light of the U.S. Supreme Court’s 2023 decision in *Students for Fair Admissions v. President and Fellows of Harvard College* and *Students for Fair Admissions v. University of North Carolina,* many might wonder how much of the narrowing gap between Black-White educational attainment is due to affirmative action policies at colleges and universities. In the Harvard and North Carolina cases, the Court ruled that these schools’ affirmative action programs violated the equal protection clause of the U.S. Constitution because they were not tailored to achieve a compelling government interest.

In the wake of the decision, many analysts have pointed to affirmative action as a crucial policy that narrowed racial differences in levels of educational attainment. But as many social scientists have pointed out, affirmative action is an issue only at highly selective schools. One recent study noted that “enrollment at elite colleges account for less than 1% of total college enrollment and have [had] little impact on average incomes” in the United States (Chetty et al., 2023).

Although admissions offices at elite colleges will find it much harder to use race as a factor in admissions in the years to come, it would be hard to make the case that elimination of these programs will have a significant impact on educational attainment levels or mean racial inequality in the United States. A somewhat stronger argument can be made that graduates of Ivy League institutions (the ones impacted by the Supreme Court decision) fill a disproportionate number of leadership positions, but even these arguments can be misleading since 90% of Fortune 500 executives do not come from such institutions.

## Employment and Income

As a result of increased educational attainment, Blacks now hold slightly more managerial and professional jobs than they did in 1960, though still not in proportion to their overall numbers. In 2021, 33.9 percent of Blacks held managerial or professional positions in the United States; of

Hispanics, 24.5 percent held such jobs; of Asians, 58.1 percent; and of Whites, 42.8 percent (U.S. BLS, 2023h).

The unemployment rate of Black and Hispanic men outstrips that of Whites by the same degree today as it did in the early 1960s. While the total unemployment rates for all groups jumped to 14.1 percent during the height of the Covid-19 pandemic in 2020, the unemployment rates for Black and Hispanic Americans were 16.3 and 17 percent, respectively, compared to 12.2 percent for White Americans (Smith et al., 2021). As of the end of 2021, unemployment rates had fallen across the board, but disparities remained: The rate was 3.6 percent for Whites, 7.1 percent for Blacks, 5.3 percent for Hispanics, and 4.0 percent for Asians (U.S. BLS, 2023i). However, this gap is considerably smaller among more educated persons ages 25 and over. The unemployment rates for adults with a bachelor's degree or more are 2.0 percent for Whites, 2.9 percent for Blacks, and 2.9 percent for Hispanics (U.S. BLS, 2023j).

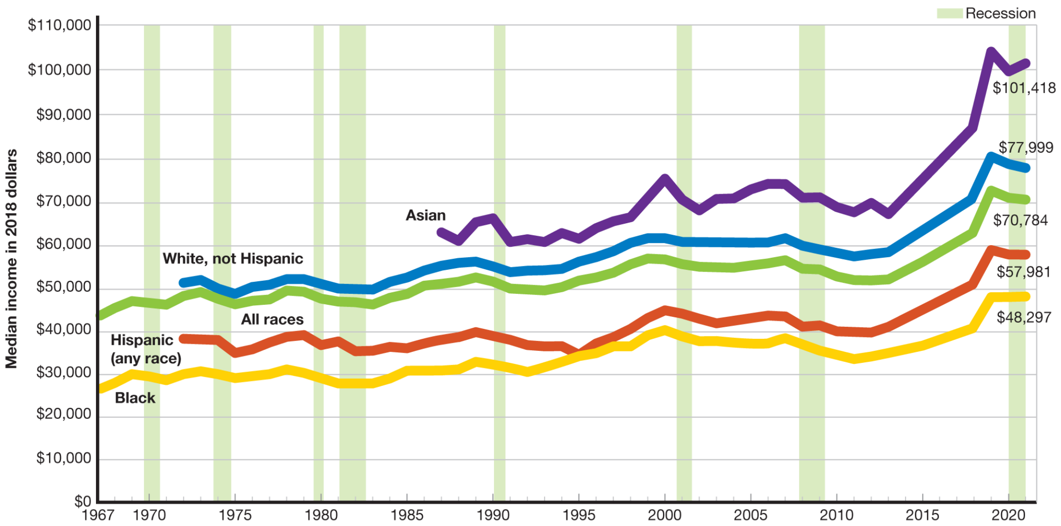
There has also been debate about whether employment opportunities for minorities have improved or worsened, especially in the wake of the recent pandemic. Statistics on unemployment don't adequately measure economic opportunity because they reflect only those known to be looking for work. A higher proportion of disillusioned Blacks and Hispanics have simply opted out of the occupational system, neither working nor looking for work. They have become disillusioned by the frustration of searching for employment that is not there. Unemployment figures also do not reflect the increasing numbers of young minority men in prison (see also Chapter 7).

While the disparities between the earnings of Blacks and Whites have diminished, significant gaps in earnings and income remain (**Figure 11.3**). As measured in terms of median weekly earnings, Black men earned 81.2 percent of the level of pay of White men in 2023 (U.S. BLS, 2023r). In 1959, the proportion was 49 percent. Black women fare relatively better but still lag behind White women today, earning 89.9 percent as much as their White counterparts (U.S. BLS, 2023r). The Black-White gap in household income has remained relatively unchanged since the early 1970s. In 2021, median household income for Blacks was $48,297, just over 60 percent of the median household income for Whites that year ($77,999) (Semega & Kollar, 2022a). Even more stark is the Black-White gap in wealth: The median household net worth among Blacks is 8 percent that of Whites ($14,100 versus $187,300 in 2019) (Bennett et al., 2022).

Though the economic status of Blacks appears to have improved, prospects for Hispanics stagnated or worsened over the last two decades. Between 2000 and 2012, Hispanic household incomes (adjusted for inflation) decreased significantly. Yet the rate of Hispanic household poverty has remained very similar to that of Blacks. In 2021, the poverty rate was 17 percent for Hispanics and 19.5 percent for Blacks (Creamer et al., 2022a). The large influx of poor immigrants explains some of the decline in average income, but even among Hispanics born in the United States, income levels have declined. As one Latino group leader commented, "Most Hispanic residents are caught in jobs like gardener, nanny, and restaurant worker that will never pay well and from which they will never advance" (quoted in Goldberg, 1997). As a result, Hispanic households have lagged far behind White households. In 2021, the median household income of Hispanics was 77 percent that of non-Hispanic Whites (Semega & Kollar, 2022a). The median White household wealth was more than 5 times that of Hispanics ($187,300 versus $31,700) (Bennett et al., 2022).

Figure 11.3

**REAL MEDIAN HOUSEHOLD INCOME BY RACE AND HISPANIC ORIGIN, 1967–2021**




Source: Semega & Kollar, 2022a.

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## Health

Race not only affects our life chances in the form of education, employment, and income; it also has an impact on our health. The Covid-19 pandemic is a perfect case in point. Though the virus was dubbed the great equalizer—one that struck rich and poor alike—the statistics indicate otherwise. The rate of infection, hospitalization, and fatality was, in fact, far higher among Blacks and Latinos than it was among Whites and Asians. Although scientists and the media reported that the greatest risk factor for those infected was age, the number of fatalities among Blacks and Latinos ages 18 to 49 belied that claim. Indeed, by April 2020 it became clear that Blacks were bearing the brunt of the pandemic. Constituting a mere 13 percent of the U.S. population, they accounted for 30 percent of the deaths. In some states the disparity was even worse; in Wisconsin, for example, where Blacks amount to only 6 percent of the population, they accounted for 40 percent of the fatalities. As there is no evidence that people of color are more susceptible to coronavirus, how can this difference be explained?

The answer seems to lie primarily in preexisting medical issues caused by social inequality. Studies by the Centers for Disease Control and Prevention (CDC) indicate that Blacks and Latinos have significantly higher rates of obesity, high blood pressure, and diabetes—all conditions that exacerbate the effects of the coronavirus and increase the possibility of hospitalization and death. The vulnerability of these populations to these preexisting conditions is due to a combination of factors, most notably their lower socioeconomic status within society and their lack of access to decent health care coverage, as well as the stresses that arise from working multiple jobs, living in subpar housing, and dealing with the pressure of constant financial instability. Moreover, due to redlining and housing discrimination, people of color are also more likely to live in neighborhoods close to large highways, toxic waste dumps, and factories, where they are exposed to pollutants that may cause respiratory conditions that likewise increase their risk of suffering the more dangerous symptoms of Covid-19. Finally, their susceptibility to the virus was magnified by the fact that people of color tended to be employed in jobs that could not be moved online during the pandemic. Thus, while more affluent professionals could isolate themselves at home, Blacks and Latinos continued doing essential work such as delivering mail and food, tending to the sick in hospitals, conducting public transportation, and cleaning public and private spaces—thereby increasing their potential exposure to the disease.

In short, the pandemic was less an equalizer than a magnifier of already existent racial inequality that corroborated many previous studies, such as that conducted by Jake Najman (1993), who surveyed the evidence linking health to racial and economic inequalities. Najman also considered strategies for improving the health of the poorer groups in society. After studying data for a number of countries, including the United States, he concluded that for people in the poorest 20 percent, as measured in terms of income, the death rates were 1.5 to 2.5 times those of the highest 20 percent of income earners. In the United States, the rate of infant mortality for the poorest 20 percent was four times higher than for the wealthiest 20 percent. When differences were measured between the wealthiest Whites and the poorest African Americans in the United States, rather than only in terms of income, the contrast in infant mortality rates was even higher—five times higher for Blacks than for Whites. We have, however, seen some improvement in recent years: Between 1995 and 2017, the infant mortality rate for Blacks dropped from 14.6 to 11 deaths per 1,000 births, narrowing the Black-White gap in infant mortality by 30 percent.

While there remains a Black-White gap in life expectancy—the average age to which an individual at birth can expect to live—this gap has also decreased in recent years, from 7 years in 1990 to 3.5 years in 2017; this decrease is due in part to greater decreases in death rates for Blacks from heart disease, cancer, and HIV (Arias & Xu, 2019). The homicide death rate for Blacks has also gone down, though the peak rate for Black men is still nearly nine times higher than for White men (Smith & Cooper, 2013).

How might the influence of poverty and race on health be countered? Extensive programs of health education and disease prevention are one possibility. But such programs work better among prosperous, well-educated groups and usually produce only small changes in behavior. Increased accessibility to health services would help, but probably to a limited degree. The only truly effective policy option, it is argued, would be to attack poverty itself, so as to reduce the income gap between rich and poor (Najman, 1993).

## Residential Segregation

Neighborhood segregation seems to have declined little over the past quarter century. Studies show that discriminatory practices between Black and White clients in the housing market continue (Pager & Shepard, 2008). Black and White children now attend the same schools in most rural areas

of the South and in many smaller and medium-size cities throughout the country. Most Black college students now also attend the same colleges and universities as Whites, instead of all-Black institutions (Bullock, 1984; U.S. Department of Education, 2016). Yet, in the larger cities, a high level of educational segregation persists as a result of the continuing movement of Whites to suburbs or rural areas. A recent report from UCLA on educational segregation found that the average Black student attends a school that is 49 percent Black while the average White student attends a school with just 8 percent Black students. In central cities, nearly 90 percent of students are non-White. Importantly, schools that serve a majority of Black and Latino students also have predominantly low-income students, amounting to what the study authors refer to as “double segregation”—segregation by both race and class (Orfield & Frankenberg, 2014).

In *American Apartheid* (1993), Douglas S. Massey and Nancy A. Denton argue that the history of racial segregation and its urban form, the Black ghetto, are responsible for the perpetuation of Black poverty and the continued polarization of Black and White people. Even many middle-class Blacks still find themselves segregated from White society. For them, as for poor Blacks, this becomes a self-perpetuating cycle. Affluent Blacks who could afford to live in predominantly White neighborhoods may choose not to because of the struggle for acceptance they might face. The Black ghetto, the authors conclude, was constructed through a series of well-defined institutional practices of racial discrimination—private behavior and public policies by which Whites sought to contain growing urban Black populations. Until policy makers, social scientists, and private citizens recognize the crucial role of such institutional discrimination in perpetuating urban poverty and racial injustice, the United States will remain a deeply divided and troubled society.

## Political Power

Barack Obama made history when he was elected the first Black president of the United States in 2008. His election is part of a larger trend of Blacks making tremendous gains in holding elective offices; the number of Black public officials increased from 40 in 1960 to more than 10,500 in 2010, and that number continues to increase (Bositis, 2001; Joint Center for Political and Economic Studies, 2011). In spite of high-profile victories such as Obama’s, most elected Black officials hold relatively minor local positions, although quite a few mayors and judges are Black.

The share of representation that Latinos and African Americans have in Congress is still not proportionate to their percentage of the population; however, racial minorities now represent nearly a quarter of Congress. In 2023, there were 53 Black members and 46 Hispanic members of Congress (Schaeffer, 2023). Most of this diversity is found in the House of Representatives. As of 2023, there were three Black senators (Cory Booker from New Jersey, Tim Scott from South Carolina, and Raphael Warnock from Georgia) and six Hispanic senators (Catherine Cortez Masto from Nevada, Ted Cruz from Texas, Ben Ray Luján from New Mexico, Bob Menendez from New Jersey, Alex Padilla from California, and Marco Rubio from Florida).

Barack Obama became the first African American president of the United States in the historic election of 2008.

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# How Can Ethnic Conflict Be Reduced?

The most extreme and devastating form of group relations involves genocide—the systematic destruction of a racial, political, or cultural group. The most horrific recent instance of brutal destruction of such a group was the massacre of 6 million Jews in the German concentration camps during World War II. Other examples of mass genocide in the twentieth century span the globe. Between 1915 and 1923, more than a million Armenians were killed by the Ottoman Turkish government. In the

late 1970s, 2 million Cambodians died under the Khmer Rouge. During the 1990s, in the African country of Rwanda, hundreds of thousands of the minority Tutsis were massacred by the dominant Hutu group. In the former Yugoslavia, Bosnian and Kosovar Muslims were executed by the Serb majority. And in the Darfur region of Sudan, the conflict between the Arabic-speaking, nomadic Janjaweed and the non-Arab Sudanese who speak African languages escalated to genocide, with hundreds of thousands of people killed and approximately 2 million forced to flee their homes.

The conflicts in the former Yugoslavia involved ethnic cleansing—the creation of ethnically homogeneous areas through the mass expulsion of other ethnic populations via targeted violence, harassment, threats, and campaigns of terror. Croatia, for example, became a “monoethnic” state after a costly war in which thousands of Serbs were expelled from the country. The war—which broke out in Bosnia in 1992 between Orthodox Serbs, Catholic Croats, and Bosnian Muslims—involved the ethnic cleansing of the Bosnian Muslim population at the hands of the Serbs. Thousands of Muslim men were forced into internment camps, and Muslim women were systematically raped. The war in Kosovo in 1999 was prompted by charges that Serbian forces were ethnically cleansing the Kosovar Albanian (Muslim) population from the province.

In Bosnia and Kosovo, ethnic conflict became internationalized. Hundreds of thousands of refugees fled to neighboring areas, further destabilizing the region. Western states intervened diplomatically and militarily to protect the human rights of targeted ethnic groups. In the short term, such interventions succeeded, yet they had unintended consequences as well. The fragile peace in Bosnia has persisted only through the presence of peacekeeping troops and the partitioning of the country into separate ethnic enclaves. In Kosovo, reverse ethnic cleansing ensued after the North Atlantic Treaty Organization (NATO) bombing campaign. Ethnic Albanian Kosovars began to drive the local Serb population out of Kosovo; the presence of NATO-led Kosovo Force troops was inadequate to prevent ethnic tensions from reigniting.

Violent conflicts worldwide are increasingly civil wars with ethnic dimensions. In a world of growing interdependence and competition, international factors become even more important in shaping ethnic relations, while the effects of internal ethnic conflicts are felt well outside national borders—sometimes provoking military intervention and sometimes requiring international war crimes tribunals. Responding to and

preventing ethnic conflicts have become key challenges facing individual states and international political structures.

In some areas of the world, the concept of group closure has been institutionalized in the form of segregation—the practice of keeping racial and ethnic groups physically separate by law, thereby maintaining the superior position of the dominant group. For instance, in apartheid-era South Africa, laws forced Blacks to live separately from Whites and forbade sexual relations between races. In the United States, African Americans experienced numerous legal forms of segregation, including, until 1967, the prohibition of interracial marriage, which had been criminalized for more than 270 years in every state except Alaska and Hawaii. Even today, segregated residential areas still exist in many cities, leading some to claim that an American system of apartheid has developed (Massey & Denton, 1993).

## Conflict and Economic Power

Many commentators have argued that the best way to reduce ethnic conflicts is to establish democracy and a free market; this would promote peace by giving everyone a say in running the country and giving all people access to the prosperity that comes from trade. In *World on Fire: How Exporting Free Market Democracy Breeds Ethnic Hatred and Global Instability* (2003), Amy Chua, a professor at Yale University, contests this view.

Chua's starting point is that in many developing countries, a small ethnic minority enjoys disproportionate economic power. One example is the White minority that exploited non-White ethnic groups in apartheid South Africa. Chua argues that the massacre of Tutsis by Hutus in Rwanda in 1994 and the hatred felt by Serbs toward Croats in the former Yugoslavia were partly related to the economic advantage enjoyed by the Tutsis and the Croats in their respective countries.

Chua often mentions the Chinese ethnic minority in Indonesia, where the free-market policies of the former dictator General Suharto enriched the country's tiny Chinese minority. In turn, Chinese Indonesians supported the Suharto dictatorship. By 1998, the year that mass pro-democracy demonstrations forced Suharto to resign, Chinese Indonesians controlled 70 percent of Indonesia's private economy but made up just 3 percent of its population. The end of Suharto's regime was accompanied by violent

attacks against the Chinese minority. Chua (2003) writes, "The prevailing view among the pribumi [ethnic] majority was that it was 'worthwhile to lose 10 years of growth to get rid of the Chinese problem once and for all.'"

As Suharto's dictatorship collapsed, the United States and other Western countries called for the introduction of democratic elections. Yet Chua argues that introducing democracy to countries with what she calls "market dominant minorities," such as the Chinese in Indonesia, is likely to bring not peace but, instead, a backlash from the country's ethnic majority. Political leaders will emerge who scapegoat the resented minority and encourage the ethnic majority to reclaim the country's wealth for the "true" owners of the nation, as the pribumi majority in Indonesia did against the Chinese minority.

Chua's account illustrates that although democracy and the market economy are in principle beneficent forces, they must be grounded in an effective system of law and civil society. Where they are not, new and acute ethnic conflicts can emerge.

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**CONCEPT CHECKS**

1. **What are some of the main reasons there is a large gap in educational attainment between Hispanics and Blacks in the United States?**
2. **How do Massey and Denton explain the persistence of residential segregation?**
3. **Compare and contrast three forms of ethnic conflict.**

---

# Glossary

affirmative action
: Policies that grant preferential treatment to groups regarded as disadvantaged or subject to discrimination.

genocide
: The systematic, planned destruction of a racial, political, or cultural group.

ethnic cleansing

The creation of ethnically homogeneous territories through the mass expulsion of other ethnic populations.

segregation

The practice of keeping racial and ethnic groups physically separate, thereby maintaining the superior position of the dominant group.

# THE BIG PICTURE

# Chapter 11

## Race, Ethnicity, and Racism

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**Exercises:** Thinking Sociologically

1. Review the discussion of the assimilation of different American minorities. Then write a short essay comparing the assimilation experiences of Asians and Latinos. In your essay, identify the criteria for assimilation and discuss which group has assimilated most readily. Then explain the sociological reasons for the difference in assimilation between the two groups.
2. Is affirmative action still needed in the United States? On the one hand, increasing numbers of African Americans have joined the middle class by acquiring college degrees, professional jobs, and new homes. On the other hand, Blacks are still far more likely than Whites to lack economic opportunity. Given these differences and the arguments in the Supreme Court's 2023 ruling on affirmative action, do you think affirmative action is still needed?

# BASIC CONCEPTS p. 389

## Learning Objectives

Understand the differing meanings of the terms *race* and *ethnicity*.
Understand why race is a highly contested topic.

## Terms to Know

minority group • race • ethnicity

## Concept Checks

1. How do the changing racial categories used in the census help demonstrate that race is socially constructed?
2. Explain the difference between ethnicity and race.
3. Why are Hispanics and African Americans considered to be minority groups in American society?

# THINKING ABOUT RACISM p. 392

## Learning Objectives

Learn several key concepts that are important for understanding racism in the contemporary United States: color-blind racism, White privilege, institutional racism, overt racism, and microaggressions.

## Terms to Know

racism • prejudice • stereotyping • scapegoats • discrimination • White privilege • institutional racism • racial microaggressions

## Concept Checks

1. In what ways does the killing of George Floyd at the hands of a Minneapolis police officer provide evidence of institutional racism?
2. How does color blindness maintain racial inequality?
3. Provide one example of White privilege. What does McIntosh mean by “an invisible weightless knapsack”?
4. What is microaggression? Why is this idea problematic to some?

# RACE AND RACISM IN HISTORICAL AND COMPARATIVE PERSPECTIVE p. 400

## Learning Objectives

Familiarize yourself with the history and social dimensions of ethnic relations in the United States. Recognize the importance of the historical roots of ethnic conflict, particularly in the expansion of Western colonialism. Understand the different models for a multiethnic society.

## Terms to Know

scientific racism • apartheid • assimilation • melting pot • pluralism • multiculturalism • immigration • emigration • diaspora

## Concept Checks

1. What are three reasons racism has flourished in the United States?
2. How did the civil rights movement help minority groups achieve equal rights and opportunities?
3. According to Castles and Miller, which four trends are likely to characterize migration in the near future?
4. What is a diaspora? Explain the role diasporas play in preserving ethnic culture in contemporary societies.

# UNANSWERED QUESTIONS p. 414

## Learning Objectives

Understand the current state of immigration to the United States. Learn the forms of inequality and oppression experienced by different racial and ethnic groups in the United States.

## Terms to Know

affirmative action • genocide • ethnic cleansing • segregation

## Concept Checks

1. What are some of the main reasons there is a large gap in educational attainment between Hispanics and Blacks in the United States?
2. How do Massey and Denton explain the persistence of residential segregation?
3. Compare and contrast three forms of ethnic conflict.

# Glossary

minority group
: A group of people in a given society who, because of their distinct physical or cultural characteristics, find themselves in situations of inequality compared with the dominant group within that society.

race
: A socially constructed category rooted in the belief that there are fundamental differences among humans, associated with phenotype and ancestry.

ethnicity
: Cultural values and norms that distinguish the members of a given group from others. An ethnic group is one whose members share a distinct awareness of a common cultural identity, separating them from other groups. In virtually all societies, ethnic differences are associated with variations in power and material wealth. Where ethnic differences are also racial, such divisions are sometimes especially pronounced.

racism
: The attribution of characteristics of superiority or inferiority to a population sharing certain physically inherited characteristics. Racism is one specific form of prejudice, focusing on physical variations among people. Racist attitudes became entrenched during the period of Western colonial expansion, but seem also to rest on

mechanisms of prejudice and discrimination found in human societies today.

prejudice
: The holding of preconceived ideas about an individual or group, ideas that are resistant to change even in the face of new information. Prejudice may be either positive or negative.

stereotyping
: Thinking in terms of fixed and inflexible categories.

scapegoats
: Individuals or groups blamed for wrongs that were not of their doing.

discrimination
: Behavior that denies to the members of a particular group resources or rewards that can be obtained by others. Discrimination must be distinguished from prejudice: Individuals who are prejudiced against others may not engage in discriminatory practices against them; conversely, people may act in a discriminatory fashion toward a group even though they are not prejudiced against that group.

White privilege
: The unacknowledged and unearned assets that benefit Whites in their everyday lives.

institutional racism
: The idea that racism occurs through the respected and established institutions of society rather than through hateful actions of some bad people.

racial microaggressions
: Small slights, indignities, or acts of disrespect that are hurtful to people of color even though they are often perpetrated by well-meaning Whites.

scientific racism
: The use of scientific research or data to justify or reify beliefs about the superiority or inferiority of particular racial groups. Much of the "data" used to justify such claims is flawed or biased.

apartheid
: The system of racial segregation established in South Africa.

assimilation
: The acceptance of a minority group by a majority population, in which the new group takes on the values and norms of the dominant culture.

melting pot

The idea that ethnic differences can be combined to create new patterns of behavior drawing on diverse cultural sources.

pluralism
: A model for ethnic relations in which all ethnic groups in the United States retain their independent and separate identities yet share equally in the rights and powers of citizenship.

multiculturalism
: A condition in which ethnic groups exist separately and share equally in economic and political life.

immigration
: The movement of people into one country from another for the purpose of settlement.

emigration
: The movement of people out of one country to settle in another.

diaspora
: The dispersal of an ethnic population from an original homeland into foreign areas, often in a forced manner or under traumatic circumstances.

affirmative action
: Policies that grant preferential treatment to groups regarded as disadvantaged or subject to discrimination.

genocide
: The systematic, planned destruction of a racial, political, or cultural group.

ethnic cleansing
: The creation of ethnically homogeneous territories through the mass expulsion of other ethnic populations.

segregation
: The practice of keeping racial and ethnic groups physically separate, thereby maintaining the superior position of the dominant group.

# 12 Aging

Which of the following is true about older adults (persons age 65+) in the United States today?

1. **All older adults eventually suffer from dementia.**
2. **No older adults live in poverty because government benefits such as Social Security and Medicare provide a stable income and free health insurance to all.**
3. **The most common residence for older adults is a nursing home.**
4. **Older adults are a highly diverse population, with their health and economic security varying widely by age, race, gender, and education.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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## LEARNING OBJECTIVES

1. **Basic Concepts** Learn some basic facts about the increase in the proportion of the U.S. population that is age 65 and older. Recognize that aging is a combination of biological, psychological, and social processes. Understand how technological advances affect each of the three aging processes.
2. **Growing Old: Theories of Aging** Understand key theories of aging, particularly those that focus on how society shapes the social roles of older adults and that emphasize aspects of age stratification.
3. **Research on Aging in the United States Today** Evaluate the experience of growing old in the United States and how this experience is shaped by race, social class, gender, and birth cohort.
4. **Unanswered Questions: The Social, Political, and Economic Impacts of Population Aging** Understand and analyze the politics of generational equity. Assess the social issues of graying on a global level.

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What do the terms *senior citizen*, *elderly*, or *old age* conjure up in your mind? For many Americans, old age is viewed as a time of poor health, loneliness, dementia, and celibacy. Others view old age as a “golden” time, when cash-flush retirees sell their homes, move to Florida, and live the good life, surrounded by their golf buddies and devoted grandchildren (Carr, 2019). The truth is somewhere in between. Older adults—persons ages 65 and older—are a highly diverse group, with some enjoying good health, wealth, and happiness, and others suffering from poverty, illness, physical disability, and loneliness. This divide was especially apparent during the Covid-19 crisis of the early 2020s; older adults were dying in large numbers, with those in poor health even prior to the pandemic the most vulnerable. Often, the trajectories that set one on the path toward a rewarding or challenging later life begin decades earlier, sometimes as early as childhood.

Witness the cases of Judy Hofstadter and Alice Garvin. Judy Hofstadter, 81, lives in New York City and works full-time as a financial planner at a large firm. She keeps up a vigorous exercise regimen, shops weekly at the local farmers’ market for healthy food, devotes time to organizations

promoting peace in the Middle East, and donates her time and money to political candidates she believes in. Yet one fall day while going door to door before midterm elections, she tripped and broke her wrist. “I sacrificed my hand in service to my country,” Hofstadter says, laughing. Although she now suffers from breast cancer, significant hearing loss, a serious case of glaucoma, and excruciating neck and back pain, “she has learned to make lemonade from everything,” according to her son David Tuller (2009).

Hofstadter learned at a young age how to overcome challenges with her sense of humor intact. Born into a middle-class Jewish family that promoted academic achievement, Hofstadter entered Harvard Law School in 1951, joining only the second class to admit women. She married a physician who was physically abusive, so she gathered up the courage to take her two children and leave him. To preserve her spirit during those difficult years after she left, as her son David notes, “She funneled her energy and passion into political and social causes. She fought for integrated housing and civil liberties and infused [her children] with her progressive spirit” (Tuller, 2009).

Her fighting spirit hasn’t waned in later life. When she was first diagnosed with breast cancer, David said that she “investigated the issue like a lawyer. . . . She scoured the literature, interrogated researchers at medical conferences, and joined the boards of breast cancer advocacy groups.” Her son proudly describes her as “my model . . . for how to age with grace, compassion and vitality.” Hofstadter adds, “I think having passions takes you outside of yourself and animates your life. . . . It makes you want to take care of yourself so you can keep on going. I still look forward to the next adventure.”

Hofstadter is fortunate to have had an education at a prestigious institution, an intellectually challenging and well-paying career, two emotionally supportive and financially secure children—one a professor, the other a therapist—and a well-honed sense of problem solving. Not all older adults are so lucky. Just a few miles away, in Brooklyn, 77-year-old Alice Garvin has been dealt a much worse hand.

Alice Garvin is now fighting foreclosure, while also struggling to support her children, grandchildren, great-grandson, and grandnephew. Garvin, a retired home health aide, first faced foreclosure when she found an eviction notice on the front door of her apartment building (Mascia,

2009). The second time, the loss of her apartment was a blessing in disguise; she was evicted from a rundown apartment in a dangerous neighborhood “she couldn’t wait to leave” because of gunshots outside and “bugs falling from the ceiling” (Mascia, 2009). In both cases, Mascia notes, “Foreclosure was beyond her control: she is not a homeowner, but a tenant.” Garvin was saved by a local charity that provided her with money so she could move into a new apartment big enough for her and her large extended family.

Now in her new apartment, Garvin continues to struggle financially. Her family “survives on a patchwork of welfare,” including Social Security for Garvin, disability payments for her children and grandchildren, and an occasional visit to a food pantry. Foreclosure and economic struggles are difficult for anyone, but for Garvin, “it is just the latest blow in a lifetime filled with difficulty.” Born in South Carolina, Garvin was “an orphan by the time she was 14; she was 36 when her husband died from an alcohol-related illness. Four of her six children have died”—one from the effects of Agent Orange exposure in the Vietnam War, two from pneumonia, and one from AIDS.

Garvin is caregiver and financial provider to her two surviving sons; one cannot work because of a congenital heart problem, and the other was nearly beaten to death in a mugging 20 years ago and cannot work due to frequent seizures. Her two teenage grandsons and grandnephew were born addicted to cocaine and have lingering behavioral problems. And this past spring, Garvin became a great-grandmother. Despite her seemingly insurmountable responsibilities, she keeps a positive attitude: “I try to look forward, not back. I have a lot to keep me going now.”

Growing old can be a fulfilling and rewarding experience, as Judy Hofstadter knows. Or it can be filled with adversity and stress, as Alice Garvin has discovered. For most older Americans, the experience of aging lies somewhere in between. How we experience old age is shaped by our gender, race, social class, and historical context. Yet aging is also a cumulative process and is molded by our experiences, resources, and struggles in earlier life. How older adults navigate their later years reflects not only their personal resources, such as optimism, problem-solving skills, and energy, but also structural factors, such as economic opportunities; exposure to systemic racism, sexism, or xenophobia; and public policies.

Although old age is often accompanied by physical and cognitive declines and economic and psychological distress—as the lives of Hofstadter and Garvin reveal—more Americans are leading longer, healthier, and more productive lives than ever before. In 2020, more than 56 million Americans were age 65 or older, composing 17 percent of the U.S. population, including more than 6.7 million adults over 85 years old (Mather & Kilduff, 2020). In this chapter, we examine the nature of aging in U.S. society, exploring what it means to grow old in a world that is rapidly changing.

We first review the core concepts of aging, including the graying of the U.S. population and biological, psychological, and social aspects of aging. We next look at sociological theories that describe how people adapt to growing old. This will lead us to a discussion of contemporary research on aging in the United States, focusing on some of the special challenges facing older adults, including social isolation, health declines, ageism, and elder abuse. We next delve into important, although unresolved, questions regarding political and economic issues surrounding the aging of the American population, including Social Security and Medicare. The future of these programs affects the lives of all Americans and will gain increasing significance given the growing numbers of older people. We conclude with a discussion of the graying of the world population and what this means for individuals, governments, and societies.

# 1 BASIC CONCEPTS

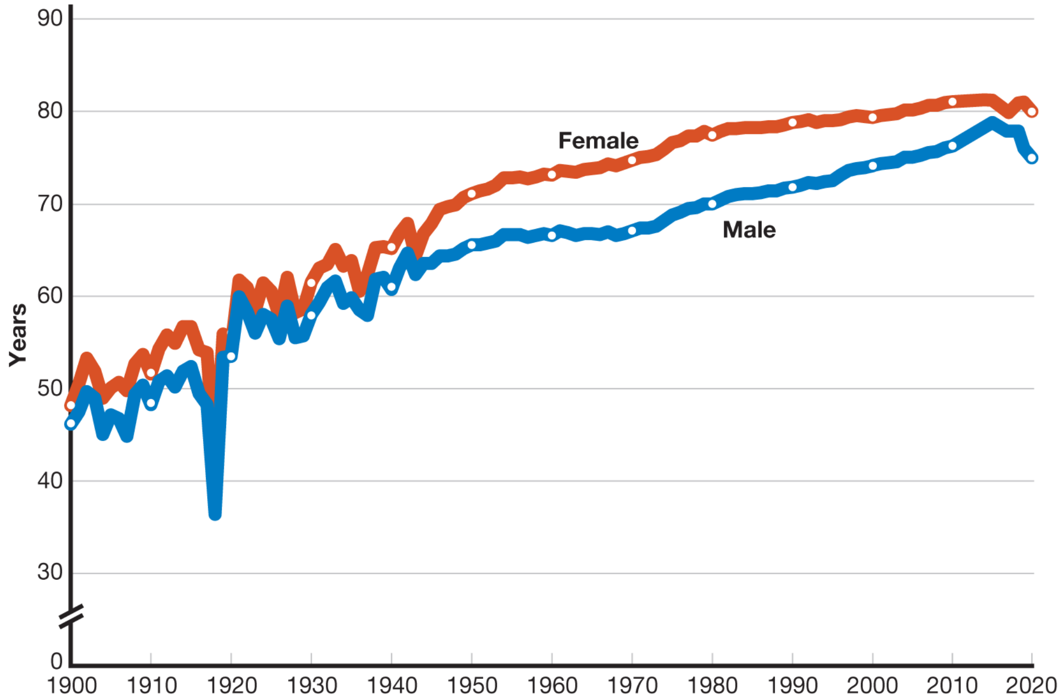
**Learn some basic facts about the increase in the proportion of the U.S. population that is age 65 and older. Recognize that aging is a combination of biological, psychological, and social processes. Understand how technological advances affect each of the three aging processes.**

## The Graying of Society

The United States and other industrial societies are said to be graying—that is, experiencing an increase in the proportion of the population classified as older adults. Older adults are generally considered to be persons ages 65 and older, although, as we will see later in this chapter, aging is a multifaceted process. Population aging, or increases in the share of all persons ages 65 and older, is the result of two long-term demographic trends in industrial societies: the tendency of families to have fewer children (discussed in Chapter 15) and the fact that people are living longer.

Figure 12.1

**AVERAGE LIFE EXPECTANCY AT BIRTH IN THE UNITED STATES, 1900–2020**




Source: World Bank, 2020c.

For most of human history, the average life expectancy at birth was less than 20 years; the main reason was that many people died in infancy or during early childhood. As such, the "average" age at which a person died was very low. About 2,000 years ago, the average newborn baby in Rome could expect to live to just age 22. In 1900 in the United States, the average baby boy could expect to live to about age 46 and the average baby girl to about 48. Today, by contrast, the average baby boy born in the United States has a life expectancy of 76.3 years, while life expectancy for the average baby girl is 80.3 years (**Figure 12.1**) (World Health Organization [WHO], 2020b). However, there is enormous variation in life expectancy depending on where a baby is born—from 84.6 years in Japan to 60.7 years in Sierra Leone (WHO, 2020b). Even within the United States, life expectancy varies widely; a Black baby boy born today can expect to live until about 70, whereas a White baby girl will live an average of 10 years longer—until age 80 (Hill et al., 2022).

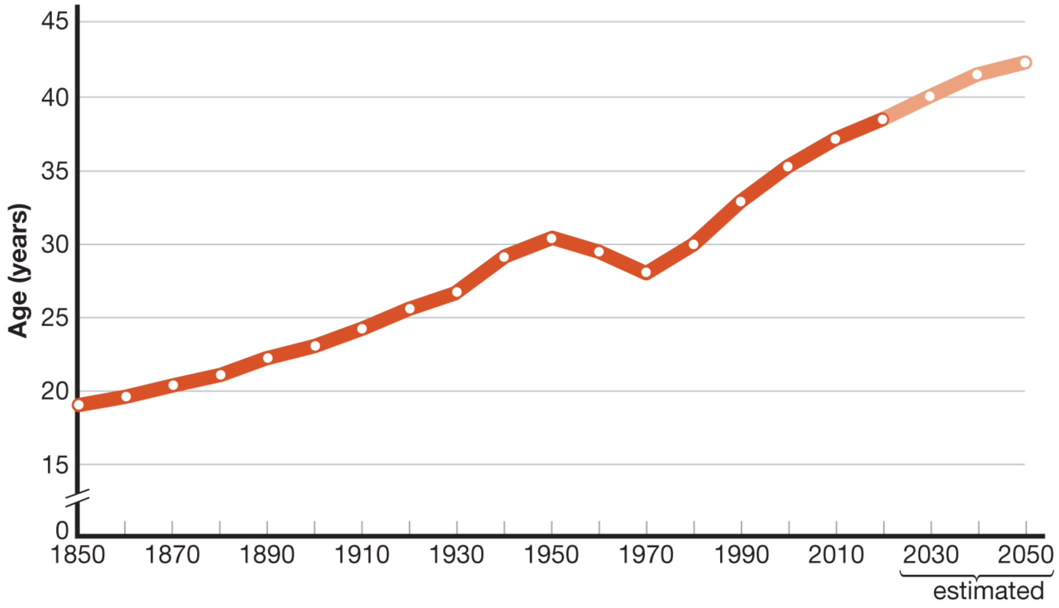
What explains the aging of the United States and other societies? Modern agriculture, sanitation systems, epidemic control, improved nutrition, and medicine have all contributed to a decline in mortality and an increase in life expectancy throughout the world. In most societies today, fewer children die in infancy and more adults survive until their seventies,

eighties, and even older. The U.S. population, like that of other industrial societies, is aging even faster than that of less industrialized nations. The number of older adults in the United States is expected to nearly double, from 52 million in 2018 to more than 95 million by 2060 (Mather et al., 2019).

Given the growing numbers of older adults and the declining numbers of younger persons, the median age of the population is rising. In 1850, half the U.S. population was older than 19. Today, half is over 38; by 2050, half will be over 42 (**Figure 12.2**). These trends have enormous importance for the future of U.S. society. In a culture that often worships eternal youth, what will happen when a quarter of the population is over 65? One of the most pressing questions for policy makers is "Who will care for these older adults when they can no longer care for themselves?" The United States has suffered from a shortage of both paid and unpaid caregivers, a problem that intensified during the Covid-19 pandemic, when stress and burnout led many long-term care workers to leave the profession. We discuss possible solutions later in the chapter.

Figure 12.2

**MEDIAN AGE OF THE U.S. POPULATION, 1850–2050**




Source: U.S. Bureau of the Census, 2014, 2019e.

# How Do People Age?

In examining the nature of aging, we will draw on studies of social gerontology, a discipline concerned with the study of the social aspects of aging. Studying aging requires a sociological imagination. How people experience old age is shaped by social and historical context (Riley et al., 1988). For instance, in 1950, just 20 percent of U.S. adults ages 65+ had graduated high school, whereas 80 percent of older adults in 2020 had earned their diploma. This historical shift means that older adults today, on average, have greater health, financial, and legal literacy than the generations that came before them. That's one key reason why older adults today are living longer than the generations before them; education is linked with healthy behaviors like not smoking, a major factor in reducing deaths from smoking-related causes like lung cancer throughout the past century (Meara et al., 2008). Education is also linked with the delay of marriage and childbearing until one's thirties or even forties—people are waiting until they have finished their schooling and found stable work. Older adults today have fewer children than their counterparts did in the mid-twentieth century and, as a result, have fewer children upon whom they can rely for their personal care.

What does it mean to age? Aging can be defined as the combination of biological, psychological, and social processes that affect people as they grow older (Abeles & Riley, 1987; Atchley, 2000; Riley et al., 1988). These processes can be thought of as three different, although interrelated, developmental clocks: (1) biological, which refers to the physical body; (2) psychological, which refers to the mind, including one's mental, emotional, and cognitive capabilities; and (3) social, which refers to cultural norms, values, and role expectations related to age. There is an enormous range of variation in all three of these processes. The very meaning of old age is changing rapidly, both because research is dispelling many outdated notions about aging and because advances in nutrition, health, and medical technology now enable many people to live longer, healthier lives than ever before.

## Biological Aging

The biological effects of aging are well established, although the exact chronological age at which they occur varies greatly depending on one's

genes, lifestyle, and luck. In general, for men and women alike, biological aging typically means

- Declining vision, as the eye lens loses its elasticity
- Hearing loss, first of higher-pitched tones, then of lower-pitched ones
- Wrinkles, as the skin's underlying structure becomes more and more brittle
- A decline in muscle mass and an accompanying accumulation of fat, especially around the abdomen
- A drop in cardiovascular efficiency, as less oxygen can be inhaled and used during exercise
- Declining immune function, and less capacity to fight viruses

The latter condition, in particular, is one reason why older adults have been particularly vulnerable to both contracting and dying of Covid-19. Older adults make up just 16 percent of the U.S. population, but they have accounted for one-third of all cases, 45 percent of all hospitalizations, and 80 percent of deaths associated with Covid-19. This risk of death increases steadily with age, with persons ages 85+ three times more likely than those ages 65 to 84 to die from Covid-19 (Centers for Disease Control Covid-19 Response Team, 2020). However, it is important to once again point out the vast diversity among older adults. The people most vulnerable to Covid-19 are those with underlying health conditions, a factor that is related to old age but not synonymous with it. Many older adults have no underlying conditions and, as such, are not particularly vulnerable to the virus.

What are some of the assistive technologies that allow us to live full, active lives as we age?

Yet despite troubling media images of older adults' deaths from Covid-19, many older adults fared well during the pandemic. Biological declines that accompany aging are inevitable, but they can be partly delayed by low to modest levels of stress, proper diet and nutrition, regular participation in vigorous exercise, and eschewing cigarettes and heavy alcohol consumption (Butler, 2010). Lifestyle can make a significant health difference for people of all ages. Some scientists have even argued that with a healthy lifestyle and advances in medical technology, more and more people will be able to live relatively illness-free lives until they reach their biological maximum, experiencing only a brief period of sickness just before death (Fries, 1980; Vaupel et al., 1998). Eventually, of course, the biological clock runs out for everyone. About 90 to 100 years seems to be the upper end of the genetically determined age distribution for most human beings, although some have argued that it may be as high as 120 (Fries, 1980; Carnes et al., 2003).

Gerontologists agree that senescence, or physical decline that accompanies aging, is inevitable. However, today's older adults now have unprecedented access to many assistive technologies that enable them to live full and active lives. These are products that increase, maintain, or improve the functional capabilities of individuals with disabilities. Such products range from hearing aids and eyeglasses to canes, walkers, and "grabbers" (which help frail older adults reach a box of cereal on a high shelf in their kitchen), to computer-screen magnifiers and oversize kitchen utensils. Gerontologists also consider household modifications, such as chair lifts, wheelchair ramps, and grab bars in the shower, as assistive devices.

About 30 percent of older adults have used a mobility device, including a cane, walker, wheelchair, or scooter, in the last month (Freedman et al., 2014). One of the most important benefits of such devices is that they enable older adults to maintain their independence, keep up daily routines, and stay in their own homes (rather than move to an assisted-living facility) for as long as possible. These devices are particularly helpful for preventing falls; one in four persons over age 65 report a fall each year, making falls the leading cause of accidents and a common trigger of hospitalizations among older adults (Moreland et al., 2020). In this way, technological advances have altered the impact of biological aging on older adults' lives. However, access to these devices and other

supports to accommodate older adults with physical limitations depends on one's financial resources. Medicare Part A, the federal health insurance program provided to older adults, does not cover the costs of assistive devices. Rather, Medicare beneficiaries must purchase additional coverage, called Medicare Part B, to defray the partial costs of devices like walkers. This is one of the reasons why older adults' quality of life varies so dramatically on the basis of factors like socioeconomic status.

## Psychological Aging

At the opening of this chapter, you learned that the statement "all older adults eventually suffer from dementia" was false. While many people believe claims like "all older adults are senile" or "old people are depressed," neither of these statements is true for the majority of older adults. Even though memory, intelligence, reasoning skills, and both the capacity and motivation to learn are widely assumed to decline with age, research into the psychology of aging suggests a much more complicated process (Schaie & Willis, 2021). For most people, memory and learning ability, for example, do not decline significantly until very late in life, although the speed with which one recalls or analyzes information may slow somewhat, giving the false impression of mental impairment. For most older adults whose lives are stimulating and rich, such mental abilities as motivation to learn, clarity of thought, creativity, and problem-solving capacity do not decline significantly until the late eighties (Salthouse, 2019).

Even Alzheimer's disease—the progressive deterioration of brain cells that is the primary cause of dementia in old age—is relatively rare in noninstitutionalized persons under 75, although it afflicts about one-third (33.2 percent) of all people over 85 and is the seventh leading cause of death in the United States (Alzheimer's Association, 2022). Given the projected steep growth in the number of persons 85 and older in the coming decades, caring for and treating Alzheimer's patients will be an important challenge. An estimated 6.5 million older adults currently suffer from Alzheimer's disease and related dementias. This number is expected to increase by almost 35 percent, to 7.1 million older adults, by 2025 and may nearly triple by 2050 (Alzheimer's Association, 2022).

Scientists have recently developed new technologies that enable an earlier and more accurate detection of dementia and Alzheimer's. This advance holds great promise for treating patients before the disease progresses too far (Alzheimer's Association, 2017). Former president Ronald Reagan is perhaps the most famous example of someone who suffered from Alzheimer's; his wife, Nancy Reagan, spoke out publicly about the profound physical and emotional challenges of providing care to an Alzheimer's patient and called for the use of stem cell research to find a cure (Collins, 2004). Gerontologists are cautiously optimistic about the promise of science to help fight the ravages of Alzheimer's disease.

## Social Aging

Social aging refers to the norms, values, and roles that are culturally associated with a particular chronological age. Historically, social roles in the United States have been closely tied to one's age. The role of "student" was held by young people, while the roles of "worker," "spouse," and "parent" were held by young adults and middle-aged persons, and the role of "retiree" was reserved for older adults. Social roles also were highly age segregated; the only "old" person in a college classroom was typically the professor.

Throughout the twentieth and twenty-first centuries, however, the age boundaries of particular social roles have grown more blurred, as social roles have become less segregated by age. For example, as young people stay in school longer and graduate from school later, they delay the traditional markers of "adulthood"—full-time employment, marriage, childbearing, and home ownership—until their thirties, forties, and even later. Young people in their twenties and thirties are living with their parents, unable to afford their own apartments as they struggle with educational debt (Barroso et al., 2020). During the Covid-19 pandemic, more than half of all young adults ages 18 to 29 lived with their parents, the highest share documented since the Great Depression of 1929 (Fry et al., 2020). Some young people returned to their parents' home because their college campuses closed, whereas others had lost their jobs and were struggling financially.

People who become new parents for the first time in their forties are parents to young adults at age 65, while in prior generations, most people aged 65 were happily settled into the role of grandparent or even great-

grandparent. Similarly, changes in the labor force mean that adults are working into late life and many need to retrain or retool their skills. “Nontraditional age” students now represent nearly 50 percent of college enrollment. Many older adults saw their pensions, home values, and savings evaporate in the recession that began in 2007, forcing them to delay their retirement past age 65. Some remained in their lifelong jobs, while others cut back to part-time hours or took “bridge” (transitional) jobs between their full-time lifelong job and retirement (Sackmann & Wingens, 2003). Yet retirement is no longer the exclusive domain of older adults. Some middle-aged adults, especially those in high-paying jobs, may be forced to retire early if their companies can no longer afford to employ them—and instead hire less skilled, less costly younger workers. The Covid-19 pandemic also affected older adults’ work lives, with some choosing to retire early rather than face the risk of becoming ill. Yet other workers who lost their jobs struggled to find new employment, facing age discrimination when seeking new work (Bui et al., 2020).

Social aging, like biological and psychological aging, has been transformed by technology. In earlier decades, older adults (especially women) were considered physically unattractive or faced obstacles in seeking employment because they defied the cultural standard of youthful beauty (Clark & Griffin, 2008). Today, cosmetic surgery helps older women (and men, to a lesser extent) maintain a taut, dewy complexion via processes such as Botox injections and face-lifts, and a svelte physique via procedures such as tummy tucks and liposuction (Brooks, 2017). The cultural belief that older adults are uninterested in sex or incapable of maintaining a healthy sex life has been shattered by the development of erectile dysfunction medications such as Viagra (Loe, 2004). In the United States today, virility drugs top $5 billion in annual sales. Social scientists agree that, more than ever before, age is “just a number.”

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## CONCEPT CHECKS

1. **What is the “graying” of the U.S. population?**
2. **Compare and contrast biological, psychological, and social aging processes.**
3. **How has technology affected the processes of biological, psychological, and social aging?**

# Glossary

graying
: A term used to indicate that an increasing proportion of a society's population is over 65.

older adults
: Adults ages 65 and older.

population aging
: The relatively faster growth of the older population compared to the younger population and the resulting shifts in the age distribution of the population toward older ages. Population aging is commonly measured as an increasing median age or a rising share of the population above a certain age, such as 65.

social gerontology
: The study of aging and older adults.

aging
: The combination of biological, psychological, and social processes that affect people as they grow older.

Alzheimer's disease
: A degenerative disease of the brain resulting in progressive loss of mental capacity.

social aging
: The norms, values, and roles that are culturally associated with a particular chronological age.

# 2 GROWING OLD: THEORIES OF AGING

**Understand key theories of aging, particularly those that focus on how society shapes the social roles of older adults and that emphasize aspects of age stratification.**

Some of the earliest theories of aging emphasized individual adaptation to changing social roles as a person grows older. Later theories focused on how society shapes the social roles of older adults, often in inequitable ways, and emphasized various aspects of age stratification. The most recent theories emphasize micro-macro links and focus on how persons ages 65+ actively create their lives within specific institutional and historical contexts (Bengston et al., 2005) (see Table 12.1).

## Functionalism

The earliest theories of aging reflected the functionalist approach that was dominant in sociology during the 1950s and 1960s. These early theories often assumed that aging brings with it physical and psychological decline and that changing social roles should take into account this decline (Hendricks, 1992). Functionalist theories, in particular, emphasized how individuals adjusted to changing social roles as they aged and how the roles older adults fulfilled were useful to society.

Talcott Parsons (1960), one of the most influential functionalist theorists of the 1950s, argued that U.S. society needs to find roles for older persons that are compatible with their advanced age. He expressed concern that the United States, with its emphasis on youth and its denial of death, had failed to provide roles that adequately drew on the potential wisdom and maturity of its older citizens. This failure could lead to older people becoming discouraged and alienated from society. To achieve a "healthy maturity," Parsons (1960) argued, older adults need to adjust psychologically to their changed circumstances, while society needs to redefine the social roles of the older population.

## Disengagement Theory

Parsons's ideas set the stage for the development of disengagement theory, which asserts that it is functional for society to relieve people of their traditional roles when they become old, thereby freeing up those roles for other, younger persons (Cumming & Henry, 1961; Estes et al., 1992). According to this perspective, given the increasing frailty, illness, and dependency of older persons, it becomes increasingly dysfunctional for them to occupy roles they are no longer capable of adequately fulfilling. Older adults should therefore retire from their jobs, pull back from civic life, and eventually withdraw from their other activities and relationships. Disengagement is assumed to be functional for society because it opens up roles formerly filled by the older adults for younger people, who presumably will carry them out with fresh energy and new skills. Disengagement also is assumed to be functional for older adults because it enables them to abandon potentially taxing social roles and instead invest their energies in more private introspective activities as they prepare for their eventual demise.

Although there is some empirical support and ample anecdotal evidence for the validity of disengagement theory, the idea that old people should completely disengage from the larger society presumes that old age necessarily involves frailty and dependence. This is an incorrect assumption; one in five older adults lives disease-free (Schafer & Ferraro, 2012), and 7 percent of deaths in old age occur suddenly, meaning the older person had no illness prior to death (Lunney et al., 2003). Recent studies suggest that selective disengagement from some roles—rather than complete disengagement from all roles—can be healthy if the older adult chooses which roles to drop and which to maintain. For example, most retirees report quite high levels of life satisfaction; however, the happiest retirees are those in good health, with strong social ties, adequate financial resources, and engagement in other productive activities, such as volunteering or part-time work (Atchley, 2000; Barnes & Parry, 2004).

Scholars also have found that older adults may limit the number of social relationships they maintain, often dropping those relationships that are not a source of great joy or support. Socioemotional selectivity theory states that older adults selectively choose to maintain fewer, but higher-quality, relationships as they age and experience declines in health.

Casual, less rewarding ties may lapse, while only the most meaningful relationships are maintained (Carstensen et al., 1999).

## Activity Theory

Given this strong evidence that disengagement from all social roles is rare, and such disengagement does not ease the aging process, the very assumptions of disengagement theory have been challenged, often by some of the theory's original proponents (Cumming, 1963, 1975; Hendricks, 1992; Henry, 1965; Hochschild, 1975; Maddox, 1965, 1970). These challenges gave rise to another functionalist theory of aging, which drew conclusions quite opposite to those of disengagement theory: activity theory.

According to activity theory, people who are busy and engaged, leading fulfilling and productive lives, can be functional for society. The guiding assumption is that an active individual is much more likely to remain healthy, alert, and socially useful. In this view, people should remain engaged in their work and other social roles as long as they are capable of doing so. If a time comes when a particular role becomes too difficult or taxing, then other roles can be sought—for example, volunteer work in the community.

Activity theory holds that older adults who stay busy and engaged can be functional for society.

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Activity theory is supported by research showing that continued activity well into old age—whether it's volunteer work, paid employment, hobbies, or visits with friends and family—is associated with enhanced mental and physical health (Birren & Bengston, 1988; Rowe & Kahn, 1987; Schaie, 1983). Yet critics observe that not all activities are equally valuable, giving rise to the development of continuity theory. This theory specifies that older adults' well-being is enhanced when they participate in activities that are consistent with their personality, preferences, and activities earlier in life (Atchley, 1989). For instance, a retired elementary school teacher may find volunteering at a local elementary school to be much more satisfying than taking bus trips to Atlantic City or playing bingo at a local community center.

Critics of functionalist theories of aging argue that these theories emphasize the need for older persons to adapt to existing conditions, by either disengaging from socially useful roles or actively pursuing them, but that they do not question whether the circumstances older adults face are just. In response to this criticism, another group of theorists arose—those growing out of the social-conflict tradition (Hendricks, 1992).

# Social Conflict

Unlike their predecessors, who emphasized the ways older adults could be integrated into society, the second generation of theorists focused on sources of social conflict between retirement-age persons and the larger society (Hendricks, 1992). Like other theorists who were studying social conflict in U.S. society during the 1970s and early 1980s, these theorists stressed the ways in which the larger social structure helped shape the opportunities available to older adults; unequal opportunities were seen as creating the potential for conflict.

According to this view, many of the problems of aging—such as poverty, poor health, or inadequate health care—are systematically produced by the routine operation of social institutions. A capitalist society, the reasoning goes, favors those who are most economically powerful. While

some older people certainly have “made it” and are set for life, many have not—and these people must fight to get even a meager share of society’s scarce resources.

Life course theorists maintain that the aging process is shaped by historical time and place and that early life experiences can have a significant effect on later life.

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Conflict theories of aging flourished during the 1980s, when a shrinking job base and cutbacks in federal spending threatened to pit different social groups against each other in the competition for scarce resources. Older persons were seen as competing with the young for increasingly scarce jobs and dwindling federal dollars. Conflict theorists further pointed out that even among older adults, those who fared worst were women, Blacks, Latinos, immigrants, and lower-income persons (Atchley, 2000; Estes, 2011; Hendricks, 1992; Hendricks & Hendricks, 1986).

As we will see later in this chapter, the concerns articulated by conflict theorists persist today. For example, while poverty rates among older adults have plummeted over the past 60 years, with less than 10 percent of older adults now living in poverty, this figure is as high as 40 percent among unmarried Black and Hispanic older women (Carr, 2019). Persistent race gaps in life expectancy, where Black men and women die at significantly younger ages than their White counterparts, reflect lifelong exposures to stressors associated with systemic racism like discrimination, as well as obstacles to receiving timely and high-quality health care (Forde et al., 2019).

# Life Course Frameworks

Life course theorists reject what they regard as the one-sided emphases of both functionalism and conflict theories, where older adults are viewed either as merely adapting to the larger society (functionalism) or as victims of the stratification system (social conflict). Rather, life course theorists view older persons as playing an active role in determining their own physical and mental well-being, yet recognize the constraints imposed by social structural factors.

According to the life course perspective, the aging process is shaped by historical time and place; factors such as wars, economic shifts, the development of new technologies, and the emergence of infectious diseases like Covid-19 shape how people age. Yet this perspective also emphasizes agency, whereby individuals make choices that reflect both the opportunities and the constraints facing them. The most important theme of the life course perspective is that aging is a lifelong process; relationships, events, and experiences of early life have consequences for later life.

Mounting research shows that our physical and mental health in later life is closely linked to the advantages and disadvantages we faced early in life, dating back as far as childhood and infancy. People who begin life in a position of social advantage generally are better positioned to acquire additional resources than those who begin life at the bottom of the stratification system. Those born into well-off families enjoy richer economic resources, better health, and more educational opportunities in

early life—all of which set the stage for rewarding jobs, good health, and emotional well-being in later life.

Those with adversities earlier in life, like Alice Garvin, who we introduced earlier in this chapter, often are denied access to the opportunities that ensure a happy and healthy old age. Researchers have found that childhood and adolescent experiences—including parental death (Slavich et al., 2011), parental divorce (Auersperg et al., 2019), child-abuse victimization (Slopen et al., 2010), poverty (Nelson et al., 2020), and living in an unsafe neighborhood (Jivraj et al., 2020)—have harmful implications for health among older adults. Given the persistence of systemic racism in the United States, Black older adults have been exposed to a greater number of early life adversities that have long-term implications for their health, including the early deaths of family members, incarceration, violence, homelessness, and dangerous or disadvantageous work experiences (Bailey et al., 2017; Dumont et al., 2013). Often, these early adversities put young people at risk of poor health behaviors, economic strains, marital troubles, and other difficulties in young adulthood that may contribute to lifelong health problems (Carr, 2019). In other words, adversities in early life give rise to various challenges in adulthood, which accumulate to make the aging process very difficult for the disadvantaged.

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**CONCEPT CHECKS**

1. **Summarize the three theoretical frameworks used to describe the nature of aging in U.S. society.**
2. **What are the main criticisms of functionalism and conflict theory?**
3. **What are three themes of the life course perspective?**
4. **Describe the processes of cumulative adversity and advantage over the life course.**

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# Glossary

disengagement theory

A functionalist theory of aging that holds that it is functional for society to remove people from their traditional roles when they become older adults, thereby freeing up those roles for others.

socioemotional selectivity theory

The theory that adults maintain fewer relationships as they age, but that those relationships are of higher quality.

activity theory

A functionalist theory of aging that holds that busy, engaged people are more likely to lead fulfilling and productive lives.

continuity theory

The theory that older adults' well-being is enhanced when their activities are consistent with their personality, preferences, and activities earlier in life.

conflict theories of aging

Arguments that emphasize the ways in which the larger social structure helps shape the opportunities available to older adults. Unequal opportunities are seen as creating the potential for conflict.

life course

The various transitions and stages people experience during their lives.

# 3 RESEARCH ON AGING IN THE UNITED STATES TODAY

**Evaluate the experience of growing old in the United States and how this experience is shaped by race, social class, gender, and birth cohort.**

## Who Are America's Older Adults?

Older adults reflect the diversity of U.S. society that we've noted elsewhere in this textbook: They are rich, poor, and in between; they belong to all racial and ethnic groups; they live alone and in families of various sorts; they vary in their political views; and they identify as LGBTQ+ as well as heterosexual. Furthermore, like other Americans, they are diverse with respect to health: Although some suffer from mental and physical disabilities, most lead active, independent lives.

**Table 12.1 APPLYING SOCIOLOGY TO AGING**

| THEORY | APPROACH TO UNDERSTANDING AGING | CONTEMPORARY APPLICATION |
|---|---|---|
| **Disengagement theory** | It is functional for societies to relieve older people of their social roles, thereby freeing up those positions for younger persons. | Forced retirement policies that push older adults out of the workforce to make room for younger employees. |

| THEORY | APPROACH TO UNDERSTANDING AGING | CONTEMPORARY APPLICATION |
|---|---|---|
| **Activity theory** | Keeping older people busy and engaged allows them to lead productive lives, which can be functional for society. | Social programs like bingo and movie nights for older adults, regardless of their interests and skills. |
| **Continuity theory** | Older adults' well-being is enhanced when they are in social contexts that are consistent with their personality, preferences, and activities earlier in life. | Efforts by assisted-living facilities to decorate and arrange residents' rooms so they look similar to their long-time homes. |
| **Critical theories** | Many of the problems of aging—such as poverty, poor health, or inadequate health care—are systematically produced by the routine operation of social institutions. | Rates of poverty among older adults differ dramatically by race and gender, reflecting systemic racism and sexism. |

| THEORY | APPROACH TO UNDERSTANDING AGING | CONTEMPORARY APPLICATION |
|---|---|---|
| **Life course perspectives** | Aging processes are shaped by structural factors like economic shifts, and aspects of personal agency, like aspirations. | Boys and girls in the early twentieth century may have held similar career aspirations, but men received more structural support than women. |

A portrait of older Americans reveals that Whites are overrepresented among persons age 65 and older. Fully 77 percent of Americans age 65 and older in 2016 were non-Hispanic White, just 9 percent were Black, 8 percent Hispanic (of any race), 4 percent Asian/Pacific Islander, and 0.5 percent Native American (U.S. Bureau of the Census, 2017f). These statistics reflect both Whites' longer life expectancy relative to Blacks and the fact that many older Latino immigrants return to their home countries in later life so that they can spend their final years with their families.

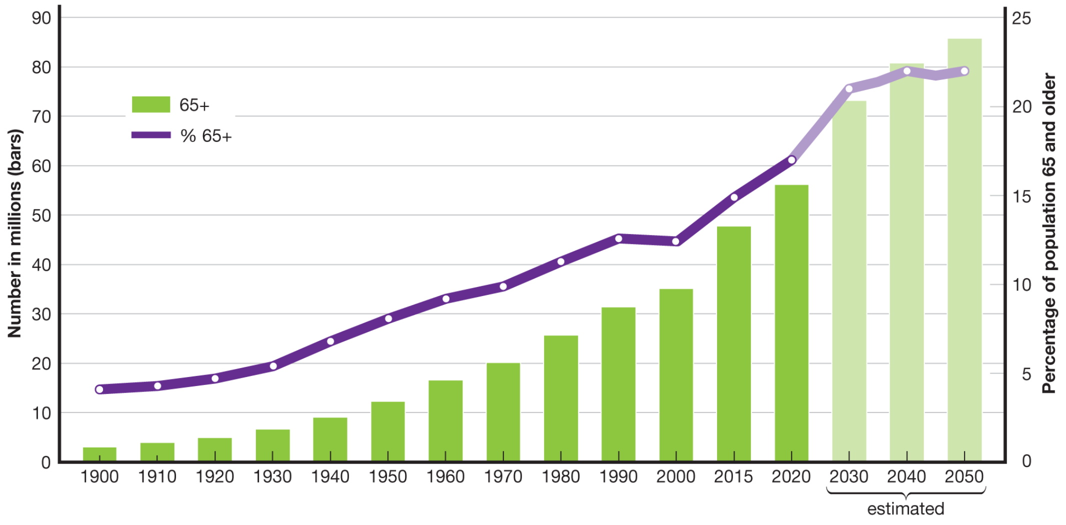
Currently, over 13.9 percent of the age 65+ population in the United States are foreign born (Mizoguchi et al., 2019). In California, New York, Hawaii, and other states that receive large numbers of immigrants, as many as one-fifth of the older population were born outside the United States (Shin & Kominski, 2010). Most older immigrants either do not speak English well or do not speak it at all. Integrating older immigrants into U.S. society poses special challenges: Some are highly educated, but most are not. Most lack a retirement income, so they depend on their families or public assistance for support. Linguistic isolation is also a concern, for those who live with family members or in neighborhoods where few people share their language (Gubernskaya & Treas, 2020).

Finally, as people live to increasingly older ages (see Figure 12.3), the age 65+ population is becoming diverse in terms of age itself. It is useful

to distinguish among different age categories of the old, such as the young old (ages 65 to 74), the old (ages 75 to 84), and the oldest old (ages 85 and older). The young old are most likely to be economically independent, healthy, active, and engaged; the oldest old, the fastest-growing segment of the older population, are most likely to encounter difficulties such as poor health, financial insecurity, isolation, and loneliness. During the Covid-19 pandemic, oldest old adults accounted for a vastly disproportionate share of deaths, a function not solely of biological aging, but of the fact that they were more likely to live in congregate living situations like long-term care facilities where the disease could spread quickly (Gardner et al., 2020).

Figure 12.3

**GROWTH OF THE 65 AND OLDER POPULATION IN THE UNITED STATES, 1900–2050**




Source: Vespa et al., 2020.

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Social, economic, and psychological differences among the young old, old, and oldest old are not due only to the effects of aging; they may also reflect one's birth cohort. The young old came of age during the post–World War II period of strong economic growth and benefited as a result: They are more likely to be educated; to have acquired wealth in the form of a home, savings, or investments; and to have had many years of stable employment. These advantages are much less likely to be enjoyed by the oldest old, partly because their education and careers began at an earlier

time, when economic conditions were not so favorable and medical technologies were less well developed (Alwin, 2008; Idler, 1993; Manton et al., 2008).

What is the experience of growing old in the United States today? Although older adults do face some special challenges, especially during pandemics, many lead healthy, satisfying, and socially engaged lives (Carr, 2019). In this section, we describe contemporary sociological studies that document differences among the aged population in the United States, and we investigate some of the common problems that older adults confront, as well as distinctive challenges that are a product of deeply entrenched racism. We then delve into several debates about the impact of aging on society, and the ways that older persons, governments, and societies can adjust and adapt to the challenges of population aging.

# Poverty

Just over 10 percent of persons age 65 and older currently live in poverty (National Council on Aging, 2022), although some of the very poorest Americans are older adults, particularly among Blacks, Latinos, women, and those living in rural areas (Li & Dalaker, 2019). Because most older people have retired from full-time work, their income is based primarily on Social Security and private retirement programs, for those fortunate enough to have a private pension. Social Security and Medicare have been especially important in lifting many retirement-age people out of poverty. Yet people who depend solely on these two programs for income and health care coverage are likely to live modestly at best.

Nearly 9 out of 10 older adults receive Social Security benefits. In 2017, Social Security provided just over half of the average older adult's income, earnings provided 19.3 percent, pensions provided 17 percent, and asset income accounted for 3 percent (Thompson & King, 2022). Low-income households in particular are likely to rely heavily on Social Security. Among older adults in the lowest fifth of the income distribution, Social Security accounts for 81 percent of aggregate income and cash public assistance for another 10 percent. By contrast, for those whose income is in the highest income category, Social Security accounts for 15 percent, pensions for 22 percent, and asset income for 14 percent; earnings account for 45 percent (Social Security Administration [SSA],

2016b). Yet even the combination of Social Security and private pensions results in modest retirement incomes for most people; in 2017, the median income of households headed by a person age 65+ was about $45,000 (Guzman, 2019).

The economic conditions of older adults have improved steadily since the 1970s due to major expansions of the Social Security program. In 1959, 35 percent of all people 65 or older lived in poverty. That figure began to drop during President Lyndon B. Johnson's War on Poverty in the mid-1960s, when Medicare was enacted and Social Security benefits increased. By the early 1970s, poverty rates among those ages 65+ had dropped to below 15 percent, and today the rate is 10 percent. Contrast this with the poverty rate of 16.9 percent among children under 18 years (Benson, 2022). However, the low overall poverty rate among older adults conceals two serious problems: the economic strains facing persons in late midlife—those ages 55 to 64—and tremendous race and gender gaps in late-life poverty rates.

## Poverty Among Persons Ages 55–64

The Great Recession of 2008 took a particularly severe toll on persons on the brink of retirement, those ages 55 to 64. And then in 2020, midlife and older workers were particularly vulnerable to job loss due to the economic downturns and business shutdowns that resulted from the Covid-19 pandemic. Many near-retirement age adults whose businesses were shuttered also struggled to find new work, facing the added obstacle of ageism. These "nearly old or late-midlife" persons are among the older members of the large baby boom cohort, the 75 million babies born between roughly 1945 and 1964. The unemployment rates for workers between the ages of 55 and 64 more than doubled during the recession, from 3.1 percent in 2007 to 7.1 percent in 2010 (and decreased back down to 3.2 percent in 2016). According to a recent study, unemployed older workers have more difficulty finding new jobs and remain unemployed for a longer period than their younger counterparts (Wandner et al., 2018). Some face discrimination by potential employers, who believe that older workers may be less able to acquire new skills. Others may have early-onset health problems that limit the kind of work they can do. Due to the cohort's large size, unemployed persons in their late fifties and early sixties may face stiff competition from their peers who are also seeking work.

To make matters worse, many older Americans saw their retirement savings and home values plummet due to volatility in the stock and housing markets. The average income for adults age 55 to 64 fell by 6 percent during the recessionary period of 2007 to 2010, and their median household net worth dropped nearly 14 percent between 2007 and 2009. Due in part to their long spells of unemployment and evaporating assets, many near-old adults were pushed into poverty during the Great Recession. Poverty rates for adults age 55 to 64 rose from 8.6 percent in 2007 to 10.1 percent in 2010. As older Americans lost their employer-provided health insurance or exhausted their savings, many were forced to delay their medical care or receive Social Security early, at the age of 62, with a resulting 25 percent reduction in benefits.

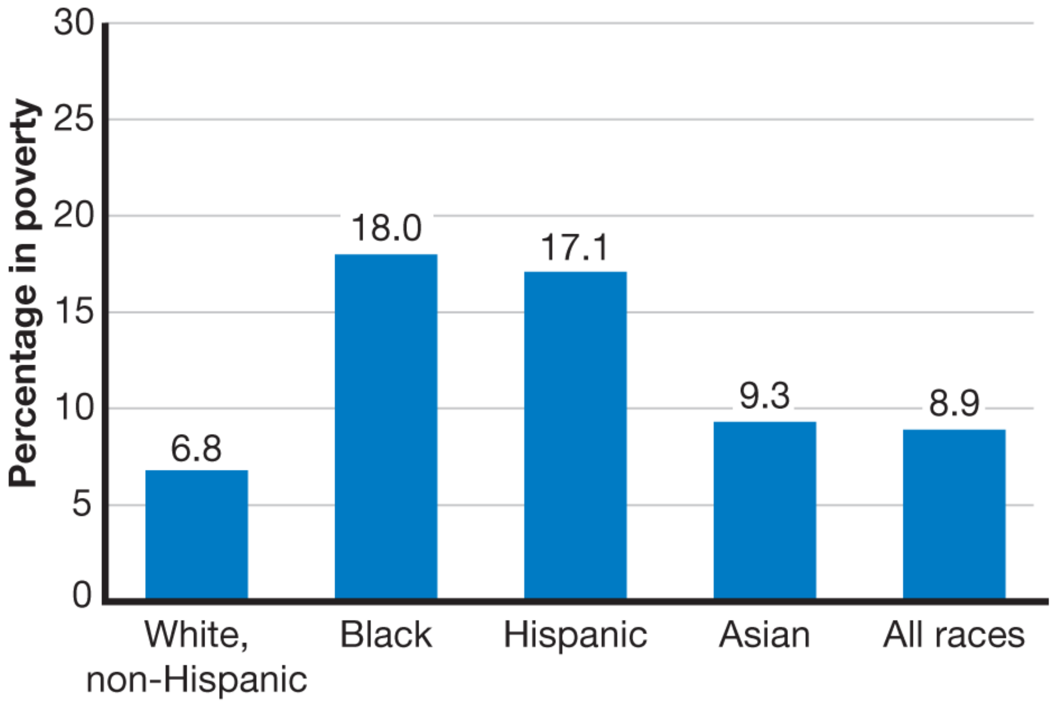
It's not surprising, then, that these aging baby boomers are very pessimistic about their financial situation. According to a 2021 poll conducted by Gallup, only 50 percent of adults ages 50 and above are satisfied with their financial situation (Saad, 2021b). As such, one-half say they either expect to work in retirement or may never retire (AARP, 2022). These strains and anxieties may set the stage for a difficult transition to old age; only future research will tell whether the well-being of older adults declines for future cohorts (U.S. Government Accountability Office, 2011).

## Subgroup Differences in Late-Life Poverty Rates

The low overall poverty rate also conceals stark race, gender, and marital status differences in poverty among persons age 65+. In 2019, the poverty rate for older women was 10.1 percent compared to 7.6 percent for older men. Older Blacks and Hispanics experienced the highest poverty rates at 18 percent and 17.1 percent, respectively, compared to 6.8 percent of older Whites and 9.3 percent of older Asians (**Figure 12.4**). We see the highest poverty rates among older women living alone: 32.1 percent of Hispanic women who lived alone and 31.7 percent of Black women who lived alone were in poverty (U.S. Administration for Community Living, 2021).

Figure 12.4

**OLDER POPULATION IN POVERTY BY RACE, 2019**




Source: U.S. Administration for Community Living, 2021.

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Despite tremendous improvements in overall economic well-being among older adults during the past half century, the future looks uncertain—at least for some older persons. Some policy experts argue that the current government indicator of poverty (see Chapter 8) does not adequately capture the economic realities of late life. The federal government has proposed an alternative calculation that takes into account rising health care costs. Under this formula, the proportion of older adults living in poverty would jump to 18.6 percent (Carr, 2019).

Some older adults whose income is low enough to render them poor have resources they can draw on, should a health or financial crisis occur. Personal savings and interest from one's savings, assets, and investments can supplement the meager income older adults receive from Social Security. Whites are more likely than Blacks to have accumulated wealth in the form of home ownership, other real estate, savings, and investments, and to have their monthly incomes boosted by interest income (Carr, 2019). Wealth—whether a healthy savings account or a home that one could sell if need be—provides a financial buffer when a crisis strikes, such as job loss, retirement, death of a spouse, or illness. Racial and ethnic gaps in wealth (and consequently, interest income) are vast, reflecting long-standing patterns of race-based discrimination in the

labor market, institutional discrimination like bank lending practices, and public policies that disadvantage Blacks, like the GI Bill (Traub et al., 2017). Black and Latinx persons are also more likely to have educational, medical, and housing debt, and high monthly interest payments make it difficult to save money at the end of the month. The financial downturns and volatility during and after the pandemic further eroded some older adults' retirement savings and investments (Morrow-Howell et al., 2020). Although some older adults may find their retirement years to be "golden," others may need to continue working far past age 65 just to maintain a minimum standard of living (Carr, 2019).

# Social Isolation

Old age historically has been considered a time of social isolation. Disengagement theory proposed that it was beneficial for both the older adult and society if the older person gradually withdrew from their social roles and relationships (Cumming & Henry, 1961). Similarly, classic role theories held that the loss of the work role for men (via retirement) and loss of the wife role for women (via widowhood) would leave older adults socially isolated and despondent (Biddle, 1986). More recent research counters, however, that while loneliness and social isolation are problematic, they are neither inevitable nor universal features of aging.

Most older adults have family members and friends they can turn to. Four out of five older people have living children, and the vast majority of them can rely on their children for support if necessary. More than 9 out of 10 adult children say that maintaining parental contact is important to them, including the provision of financial support if it is needed (Suitor et al., 2011). The reverse is also true: Many studies have found that aged parents continue to provide support for their adult children, particularly during times of difficulty, such as divorce. Most older parents and adult children report feeling that the amount of support they receive from the other is fair, and that their relationship is close and loving (Birditt et al., 2009). Most older adults have regular contact with their children and live near them; about 85 percent of older persons live within an hour of one of their children. However, relatively few live with their children. This arrangement is exactly what they want; studies repeatedly show that older adults—even those with serious physical health limitations—prefer to

remain independent and reside in their own homes. They want “intimacy at a distance” (Gans & Silverstein, 2006).

However, in 2020 when the Covid-19 pandemic was at its peak, most older adults were advised to quarantine in their homes, to minimize their risk of contracting the virus through social contact. This isolation was mandated for residents of long-term care facilities like nursing homes and hospitalized persons, who were prohibited from having visitors. Although educated older adults who were computer-savvy could remain engaged with their friends and family through videoconferencing platforms, the well-documented “digital divide” meant that those who lacked computers and smartphones were the most isolated (Morrow-Howell et al., 2020).

As tragic as this isolation was, isolation and loneliness are not necessarily synonymous. Over the past three decades, researchers have discovered that loneliness is triggered not by a quantitative lack of relationships, but rather by a lack of satisfaction with the number or quality of one’s relationships. Contemporary researchers have identified distinct types of loneliness: Emotional loneliness refers to the absence of an intimate confidant, while social loneliness refers to the absence of a broader social network. The two types often overlap; widowed persons, those living alone, or those living far away from their friends and families consistently report higher levels of both types of loneliness than persons who are more socially integrated, such as married persons or those who live with their adult children (de Jong Gierveld & Havens, 2004).

The mere presence of personal relationships does not ward off loneliness, however. An estimated one in six older married persons reports emotional and social loneliness; this pattern is particularly common among persons whose spouses are ill, who have a dissatisfying (or nonexistent) sexual relationship, and who have infrequent or conflicted conversations (Hsieh & Hawkley, 2018). As de Jong Gierveld and Havens (2004) noted, loneliness depends on one’s “standards as to what constitutes an optimal network of relationships.” That is, it’s getting less support than we want rather than the objective number of social ties that matters when it comes to loneliness.

Despite its subjective nature, loneliness is a serious problem for many older adults; it is linked to sleep problems, poor cardiovascular health, and elevated blood pressure, each of which carries long-term consequences for mortality risk (Ong et al., 2016). Loneliness also may

be a particularly serious social problem for older adults in future generations. Smaller families and increased rates of divorce and childlessness among future cohorts of older adults may create a context where older persons maintain objectively fewer relationships, thus triggering social loneliness (Manning & Brown, 2011). More important, however, some have argued that current cohorts of midlife adults have unrealistically high expectations for what their social relationships should provide (e.g., one's partner should be one's "soul mate"); if these lofty expectations go unfulfilled, then older adults may report higher levels of emotional loneliness as well (Carr & Moorman, 2011).

Researchers continue to debate whether men or women are more socially isolated in later life. Interestingly, men and women do not differ in their reports of feeling lonely, although the number and types of social ties they have differ markedly (Maes et al., 2019). Women are less likely than men to be married, yet they tend to have richer social and emotional ties to children and friends. This pattern reflects lifelong gender socialization, where women are raised to emphasize social relationships and men are raised to be independent and autonomous (Carr & Moorman, 2011).

Why might future generations face more social isolation as they age?

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Statistics confirm that older women are far less likely than men to be married. Because men die younger than women, women are more likely

than men to become widowed. Women also are more likely than men to remain widowed; a dearth of eligible male partners prevents many heterosexual older women from repartnering. Among people 65 and older in the United States, there are about 1.25 women per man (125 women for every 100 men), and this gap increases to nearly 2.0 women for every man by age 85 (189 women for every 100 men). As a result, only 10 percent of men ages 65 and older were widowers in 2020; by contrast, 30 percent of older women were widowed. Given the stark gender gap in widowhood, women are much more likely than men to live alone (33 percent versus 20 percent). By age 75, nearly half of women (42 percent) live alone (U.S. Administration for Community Living, 2021).

However, as we have just learned, being single and living alone does not necessarily mean that someone feels lonely. Many older women report that they have little interest in dating and remarrying. Carr (2004) estimated that 18 months after becoming widowed, only 10 percent of older women (yet 20 percent of men) were dating, and just 15 percent of women (yet nearly 40 percent of men) said that they would like to date. Some older women report that they do not want to remarry because they do not want to take on the homemaking and caregiving responsibilities that often accompany marriage to an older man (Crowley, 2019).

Women's more emotionally intimate social relations over the life course are an important resource as they adjust to spousal loss and social isolation. Older widows receive more practical and emotional support from their children than do widowers, given mothers' closer relationships with their children throughout the life course. Women also are more likely to have larger and more varied friendship networks than men, and these friendships provide an important source of support to women as they cope with the strains of late life (Ha, 2008).

Men, by contrast, are more likely than women to experience physical health declines, increased disability, and heightened risk of mortality after their spouses die. While popular lore claims that widowers may "die of a broken heart," research shows that the loss of a helpmate and caretaker is actually the culprit. Wives typically monitor their husbands' diets, remind them to take their daily medications, and urge them to give up vices such as smoking and drinking (Umberson et al., 1992). For many older men, wives often are their primary (or only) source of social support and integration; when a man loses his wife, he also loses an important connection to his social networks.

# Ageism

Discrimination on the basis of age, or ageism, is prohibited by federal law. The Age Discrimination in Employment Act of 1967 (ADEA) protects job applicants and employees 40 years of age and older from discrimination on the basis of age in hiring, firing, promotion, and pay. Nonetheless, prejudices based on false stereotypes are common. Older adults are frequently seen as lonely, sad, frail, forgetful, dependent, senile, old-fashioned, inflexible, and embittered (Palmore, 2015). Ageism intensified during the Covid-19 pandemic, as "old age" became viewed as synonymous with sickness and death (Monahan et al., 2020). However, epidemiologists and medical professionals are quick to point out that the most serious risk factor for the virus is underlying conditions. A 45-year-old who suffers from high blood pressure, asthma, and type 2 diabetes may be at greater risk than a healthy 72-year-old.

There are a number of reasons for the persistence of ageism. Americans' obsession with youthful beauty and vigor, reflected in popular entertainment and advertising, leads many younger people to disparage their elders, frequently dismissing them as irrelevant. Associated with the emphasis on youthfulness is a fear-filled avoidance of reminders of death and dying. Such fear carries over into negative attitudes toward older persons, who serve as a constant reminder of one's mortality (Bodner et al., 2015). The information-technology culture undoubtedly reinforces these prejudices because youthfulness and computer abilities seem to go hand in hand. In the fast-paced world of Twitter and TikTok, young people may come to view older persons as anachronistic. Over the past decade, a new stereotype has emerged: that older adults are "greedy geezers" who are relying on Social Security benefits they don't need, and in the process robbing Generation X of a secure financial future (Carr, 2023).

These stereotypes are false, yet they can also do harm in several ways. First, merely believing negative stereotypes about aging can take a toll on the health and longevity of older adults. Becca Levy (2022) asked a sample of older adults how much they agreed or disagreed with statements such as "As you get older, you are less useful." When researchers followed up with the study participants 10 years later, they found that 87 percent of those with positive attitudes, yet just 66 percent of those with negative attitudes, were still alive. The pattern was even

more pronounced at the 22-year follow-up, when 50 percent of those with positive attitudes, yet just 27 percent of those with negative attitudes, were still alive. Even after statistically controlling for possible explanatory pathways, such as health, socioeconomic status, and health behaviors, these patterns persisted, suggesting that harmful beliefs can exact a physical toll, although researchers are not certain as to why.

Second, older adults can be harmed if other people's ageist beliefs are translated into discriminatory treatment. For example, national surveys consistently show that nearly two-thirds of older adults report that they have been the victim of ageism, with their experiences ranging from minor slights, such as being treated as if they were not smart or receiving poor service at a restaurant, to more serious incidents, such as job or health care discrimination. Ageism also can undermine older adults' physical and mental health; these patterns are so pervasive that experts have recently described ageism as a "social determinant of health" (Mikton et al., 2021).

If ageist stereotypes are so harmful, why do they persist? Age-based stereotypes, like all stereotypes, have a kernel of truth (LeVine & Campbell, 1972). Prior cohorts of older adults often were less vigorous, healthy, financially well-off, integrated into society, and technologically savvy than both their younger counterparts and current cohorts of older adults. These patterns are less a reflection of older persons themselves than of society's failure to afford equal opportunities to older adults. Current cohorts of older adults, by contrast, are healthier, more integrated into society, and technologically savvier than ever before. In 2021, 61 percent of older adults used smartphones, 45 percent used social media, and three-quarters had internet access, compared to near-universal use among younger persons (Faverio, 2022). Experts agree that baby boomers may play a critical role in further helping to dissolve stereotypes of the frail, out-of-it older adult.

# Elder Abuse

The National Research Council (NRC) report *Elder Mistreatment: Abuse, Neglect, and Exploitation* (Bonnie & Wallace, 2003) defines elder abuse as "(a) intentional actions that cause harm or create a serious risk of harm, whether or not intended, to a vulnerable elder by a caregiver or

other person who stands in a trust relationship to the elder, or (b) failure by a caregiver to satisfy the elder's basic needs or to protect the elder from harm." Mistreatment may take many forms, including physical, sexual, emotional, or financial abuse, neglect, or abandonment.

Elder mistreatment is very difficult to measure and document. Older adults who are embarrassed, ashamed, or fearful of retaliation by their abusers may be reluctant to report such experiences. As a result, official prevalence rates are low. Worldwide, it is estimated that 15.7 percent of persons age 65+ experience some form of abuse in community settings (Yon et al., 2017; WHO, 2018). In the United States, the prevalence of elder abuse is estimated to be about 10 percent (Lachs & Pillemer, 2015). A longitudinal cohort study found that approximately one-tenth, or 360,000, older adults living in New York State will experience some form of elder abuse over a 10-year period (Burnes et al., 2021). One national study found that 9 percent of older adults reported verbal mistreatment, 3.5 percent reported financial mistreatment, and less than 1 percent reported physical mistreatment by a family member (Acierno et al., 2010). Women and persons with physical disabilities were most likely to report abuse. Elder abuse is likely grossly underreported: One study found that only about 7 percent of cases of elder abuse are reported to authorities (National Center on Elder Abuse, 2012).

The Covid-19 pandemic intensified all forms of family violence, including elder abuse, with some studies showing that rates nearly doubled since prior to the pandemic (Chang & Levy, 2021). Some older adults were stuck at home with stressed-out family caregivers who lashed out physically or emotionally (Makaroun et al., 2020). Older adults, anxious about their health and finances, also were targeted by scam artists posing as representatives from the Centers for Disease Control offering for-fee nasal swabs, or as governmental officials offering to "rush" their CARES (Coronavirus Aid, Relief, and Economic Security) Act stimulus checks for an up-front fee (Han & Mosqueda, 2020). Because the pandemic essentially shut down public gathering places like senior centers and houses of worship, older adults had few people with whom to confide about these hurtful and embarrassing experiences. The demise of public life also meant that fewer "eyes and ears" in the community noticed and reported signs of abuse. A shortage of home health aides and visiting nurses also meant that many older adults lacked a helper who

would notice and report bruises and scrapes, or who could offer emotional support (Chang & Levy, 2021).

Although this abuse is sometimes perpetuated by family members and caregivers, it is much more frequently inflicted by someone other than a member of the elder's immediate family. National surveys show that of those older adults who reported verbal mistreatment, 26 percent named their spouse or romantic partner as the perpetrator, 15 percent named their child, and 57 percent named someone other than a spouse, parent, or child. Similarly, 56 percent of elders who reported financial mistreatment said that someone other than a family member was responsible; when family members were reported, though, children were mentioned most often, while spouses were rarely named (Laumann et al., 2008).

# Health Problems

The prevalence of chronic disabilities among older adults has declined in recent years, and most older people rate their health as reasonably good and free of major disabilities. Still, older people obviously suffer from more health problems than most younger people, and the number and intrusiveness of health difficulties often increase with advancing age. Of adults 75 and older, more than half suffer from arthritis and about a third from heart disease (35 percent) and cancer (32 percent); hypertension is the most frequently occurring condition, afflicting 81.5 percent of men age 75 and over and 86 percent of women 75 and over (National Center for Health Statistics, 2019).

More than three-quarters (82 percent) of older adults between the ages of 65 and 74 consider their health to be "excellent," "very good," or "good"; about three out of four adults 75 and older reported the same (Graham, 2019). It is not surprising that the percentage of people needing help with personal care increases with age: Only 4 percent of adults between the ages of 65 and 74 report needing help with personal care, yet this figure rises to 9 percent for people between 75 and 84 and to 20 percent for people over 85 (U.S. Administration for Community Living, 2018).

The oldest old, or persons ages 85+, make up the fastest-growing group of older adults. Because advanced old age is associated with greater use of health care, an aging population is accompanied by rising health care

expenditures. Medicare expenditures, or public health care expenditures, on retirement-age older adults increase with age; per capita spending for older adults in 2011 was more than twice as high for persons age 96 ($16,145) than it was for those age 70 ($7,566). This increase is due in large part to the high costs of medical care at the end of life (Neuman et al., 2015).

An alternative to nursing homes, PACE (Program of All-Inclusive Care for the Elderly) is a Medicare program that allows older adults to stay in their homes while receiving the care they need.

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Evidence suggests that the most disadvantaged members of the baby boom cohort may fare particularly poorly as they reach later life; a recent analysis of National Health and Nutrition Examination Survey data shows that persons between 60 and 69 are more disabled than prior generations of young old adults (Seeman et al., 2010); the authors attribute this increase to rising rates of obesity among young and middle-aged Americans, especially Blacks and Latinos. According to the U.S. Administration for Community Living (2018), more than twice as many people 75 years and older (46 percent) report having difficulty in physical functioning as those 45 to 64 years of age (19 percent).

Health insurance is essential for older adults, given the high and rising costs of medical care. Almost all older Americans (93 percent) are

covered to some extent by Medicare. But because Medicare covers about half the total health care expenses of older adults, half of older adults supplement this coverage with private insurance. The rising costs of private insurance, unfortunately, have made this option impossible for a growing number of older adults. In 2019, older adults spent an average of $6,833 on out-of-pocket health care expenditures—an increase of 41 percent since 2006. Despite Medicare, health care costs still constitute 13.6 percent of older adults' total expenses (U.S. Administration for Community Living, 2021).

When older adults become physically unable to care for themselves, they may move into assisted-living facilities, long-term care facilities, or nursing homes. Only 1 percent of the 65+ population in 2015 lived in institutional settings such as nursing homes; however, this percentage increases dramatically with age. While only 1 percent of older adults ages 65 to 74 and 2 percent of adults ages 75 to 84 live in institutional settings, 8 percent of older adults ages 85+ do (U.S. Administration for Community Living, 2021).

**Table 12.2 WHAT IS YOUR BIGGEST FEAR ABOUT GROWING OLD?**

| When it comes to growing old, most Americans fear losing their health and independence far more than being alone or living in a nursing home. | |
|---|---|
| Losing memory | 73% |
| Losing your health | 72% |
| Running out of money | 65% |
| Losing ability to care for yourself | 67% |
| | |

| | |
|---|---|
| Winding up in a nursing home | 59% |

Source: NORC at the University of Chicago, 2017.

The average cost of a semiprivate room in a nursing home is now over $94,000 a year, while the annual cost of a room at an assisted-living facility averages $54,000 (Genworth Financial, 2021). As a result of these high costs, many reasonably well-off older adults who require such institutionalization may see their lifetime savings quickly depleted (a process dubbed “spending down”). Some receive Medicaid coverage; Medicaid is the government program that provides health insurance for the poor. It covers long-term supervision and nursing costs, although only when most of one’s assets (except for one’s home) have been used up.

Nursing homes have long had a reputation for austerity and loneliness. Living in a nursing home was cited as a concern about growing old by over half of respondents, according to a survey (**Table 12.2**). However, the quality of care in most homes has improved in recent years because of federal programs such as Medicaid that help cover the cost of care and because of federal quality regulations. Further, long-term care offers diverse options to older adults, ranging from apartments with partial nursing care and meals to units that provide round-the-clock medical assistance. Many facilities also offer a wide array of cultural, social, and recreational programs for their residents.

Despite these advances, the reputation of nursing homes and long-term care facilities was tarnished in 2020, as they were the sites of many Covid-19 outbreaks. However, these outbreaks were not a function of low-quality care or facilities. Rather, viruses spread rapidly in congregate housing, especially when the residents already had compromised health. Nursing home staff, many of whom lived in crowded households or who relied on public transit, were at particular risk of not only contracting the virus but bringing it to the facilities where they worked (Barnett & Grabowski, 2020). As a result, the future of nursing homes and Americans’ faith in them is uncertain.

# Lifelong Learning

As more and more people live well beyond the age of retirement, they enter a new stage of life for which there are few socially prescribed roles. Many people can look forward to 10 or 20 years of relatively healthy living, free from the obligations of paid work and raising a family. Furthermore, the older population will be increasingly well educated because young people today are much more likely than their parents or grandparents to have gone to college. While only 28 percent of older adults had high school diplomas in 1970, 86 percent of older adults in 2020 were high school graduates (U.S. Administration for Community Living, 2021).

These trends suggest that older persons are much more likely to remain a part of mainstream society than to become isolated (Jarvis, 2007). It is important for older adults to maintain a readiness to learn, stimulated by participation in a wide variety of learning activities; this engagement can contribute to mental alertness, a positive psychological attitude, and even improved physical health (Findsen & Formosa, 2011).

Many two-year and four-year colleges today recognize the importance of lifelong learning and offer tuition waivers for older adults. For example, 51 universities in the United States are classified as “age-friendly,” meaning that they abide by 10 principles focused on encouraging the participation of older adults in all the core activities of the university, including educational and research programs (Eisenberg, 2019). Community colleges also play an important role in lifelong learning. As noted by the American Council on Education (2008), about half of college-going adults age 50 and older attend community colleges, primarily to have fun, to connect with other people, or to retool for a new career.

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**CONCEPT CHECKS**

1. **Contrast young old, old, and oldest old persons.**
2. **Describe four common problems older Americans often confront.**
3. **What characteristics differentiate older adults who are emotionally and physically well from those who face great distress in later life?**

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# Glossary

young old
: Sociological term for persons age 65 to 74.

old
: Sociological term for persons age 75 to 84.

oldest old
: Sociological term for persons age 85 and older.

cohort
: A group of individuals who were born during the same time period, and thus share a similar pattern of historical experiences from childhood to adult life.

Social Security
: A federal program in the United States that provides retirement benefits and disability income to qualified people and their spouses, children, and survivors.

Medicare
: A program under the U.S. Social Security Administration that reimburses hospitals and physicians for medical care provided to qualifying people over 65 years old.

emotional loneliness
: The absence of an intimate confidant.

social loneliness
: The absence of a broader social network.

ageism
: Discrimination or prejudice against a person on the grounds of age.

# 4 UNANSWERED QUESTIONS: THE SOCIAL, POLITICAL, AND ECONOMIC IMPACTS OF POPULATION AGING

**Understand and analyze the politics of generational equity. Assess the social issues of graying on a global level.**

As we have learned in this chapter, the number of older adults in the United States and worldwide is at a historic highpoint, a consequence of greater numbers of people living until old age. Yet population aging creates new challenges for society. Rising numbers of older adults, alongside low birthrates, mean that the United States and many other nations have a high old-age dependency ratio. The old-age dependency ratio is the number of people ages 65 and older, divided by the number of persons ages 18 to 64. People ages 18 to 64 are presumed to be employed and paying income taxes, whereas older adults are not. A high old-age dependency ratio suggests that there may not be enough working-age people to provide care to the older adults who need it, or enough workers paying taxes to support the federal safety net (Carr, 2023). Challenges like a potential caregiver shortage and concerns about the financial stability of public programs like Social Security and Medicare are powerfully shaped by old-age dependency ratios.

Yet population aging also means that older adults can be a powerful force in Washington, due both to their large and rapidly growing numbers and to their high levels of political engagement. AARP (formerly the American Association of Retired Persons) is a highly effective advocate for the aged population. AARP is a nonprofit organization that boasts a membership of nearly 40 million Americans age 50 and older—it is reportedly the largest member-based organization in the world.

Those 65 and older have high voter turnout rates—72 percent voted in the 2020 presidential election compared to just 48 percent of those 18 to 24 years old (U.S. Bureau of the Census, 2021c). This is not to suggest

that all older adults hold the same political views; on the contrary, they are as politically heterogeneous as the other age groups. But on issues they perceive as affecting their interests, such as retirement pensions and health care reform, they are likely to have strong opinions. Moreover, because cuts in programs for older adults would shift the burden of supporting them to their families, opposition to significant reductions in these programs is likely to be widespread.

Because there is "strength in numbers," some observers have argued that older adults have undue political influence and may benefit from government programs more than younger persons do. Others counter, however, that older adults are entitled to programs such as Social Security and Medicare on the grounds of both equity and social justice (Kotlikoff & Burns, 2012). Yet as the large baby boom cohort, 75 million strong, enters later life, social scientists and policy makers are in heated debates over whether the federal government can afford to provide these benefits to older adults in coming years (Urban Institute, 2010). Such debates extend beyond the borders of the United States; throughout the globe, social scientists and policy makers wrestle with whether and how the planet can fairly provide services to an unprecedented number of older adults, sometimes dubbed the "gray tsunami" (O'Neill, 2009).

# Can Medicare and Social Security Survive the "Graying" of America?

The two principal governmental programs that provide support for the retirement-age population are Social Security and Medicare. Social Security was established with the 1935 act creating a social insurance program that paid retired workers age 65 or older (and their dependents) a continuing income after retirement. Medicare was introduced in the Social Security Act Amendments as part of President Lyndon B. Johnson's Great Society program in 1965. Medicare is the national public health insurance programs for older adults.

Older adults can start to receive Social Security benefits as early as age 62, but recipients will be penalized and receive a smaller payment for retiring early, resulting in about a 30 percent reduction in the value of their monthly lifetime benefits. Older adults become eligible for their full

benefit amount at age 65 (if born between 1960) and age 67 (if born in 1960 or after).

Workers with health problems, no other sources of income, or a lack of understanding of how Social Security works are most likely to draw benefits early, contributing to widening economic inequalities (Carr, 2019). Adults are eligible to receive Medicare benefits at age 65.

Social Security and Medicare are financed by workers' payroll deductions, employer contributions, and taxes on those who are self-employed. Working Americans pay into these programs today so they can be eligible for benefits when they are no longer able to earn a living. By providing a degree of economic support for older adults, such programs also make it economically possible to retire; in the absence of the economic security such programs provide, older adults would be under greater economic pressure to continue working as long as they are physically capable. In 2020, about 65 million Americans received over $1 trillion dollars in Social Security benefits. About 71 percent of benefits went to retired workers and their dependents; the remainder went to disabled workers and their dependents and to survivors of deceased workers (SSA, 2020). Although the program was not initially designed to be the sole financial resource for retirees, more than one-third of older adults rely on Social Security for 90 percent or more of their income (SSA, 2016c).

The monthly benefit one receives under Social Security depends in part on earnings before retirement. The average monthly benefit in December 2019 was $1,503 for retired workers and $1,258 for disabled workers (SSA, 2019). Because retired women are less likely than men to have had continuous paid employment throughout their lives, their average retirement income is typically lower than men's. As these figures suggest, Social Security provides a minimal level of support for older adults—by itself, barely enough to keep recipients out of poverty (Sullivan, 2012). Still, without such benefits, an estimated three-quarters of all older adults would live in poverty (Carr, 2019).

Protesters at a rally in Olympia, Washington, ask lawmakers not to cut the budgets for long-term health care facilities such as nursing homes and assisted-living facilities.

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Medicare is the nation’s largest health insurer, providing health insurance to 55 million Americans. Spending on Medicare totaled $582 billion in 2018, accounting for about 14 percent of the federal budget (Peter G. Peterson Foundation, 2019). Because it reaches so many people, Medicare has made an enormous difference in the aged population’s access to adequate health care—although at a high cost.

Programs such as Social Security and Medicare will become increasingly costly as more and more Americans retire and live long lives after they retire; further, the share of the population funding Social Security is shrinking. As a result, the worker-to-beneficiary ratio has fallen, from 16.5 to 1 in 1950 to 2.8 to 1 in 2015. By 2037, it will be 2.1:1 (SSA, 2016a; Urban Institute, 2010). There is particular concern over whether the Social Security system will remain financially sound as retiring baby boomers collect their pensions. It is currently expected to have sufficient assets to pay full benefits until at least 2033, although if it is to avoid running out of money in the long run, changes will have to be made in the way the system works.

One controversial proposal would involve “means testing,” or allocating benefits based on an older person’s financial means and needs. In the past decade, there also have been calls to privatize at least part of Social Security—that is, to enable workers to invest part of their Social Security withholdings in the stock market, rather than simply paying it all into a government fund. The effectiveness of this approach depends, of course, on how well the stock market performs in the future. Proposed solutions to stretch Medicare dollars include charging co-payments for home health care services, requiring beneficiaries to pay higher premiums, and increasing payroll taxes (Ayanian, 2020). The future of Social Security and Medicare will likely remain at the center of one of the major political debates of this century.

# Do Older Americans Get an Unfair Amount of Government Support?

The costs of providing Social Security and Medicare benefits are largely borne by taxes paid by working people. In the United States, the growing old-age dependency ratio has alarmed policy makers. They point out that for every 100 people of working age (20 to 64 years old) there are roughly 25 persons 65 and older; this figure will increase to 38 by 2050.

Do government programs adequately promote generational equity—the striking of a balance between the needs and interests of members of different generations? The issue of generational equity was first raised by an organization called Americans for Generational Equity (AGE), created in 1984 by David Durenberger, a U.S. senator from Minnesota, to challenge the notion that older adults are entitled to Social Security benefits (Williamson et al., 2003). AGE argued that as the U.S. population ages, those who are working will bear an increasing burden for those who are not. AGE also argued that Social Security unfairly favors retirees over other needy groups in society.

In practice, however, there is limited evidence that the average American is concerned about generational equity and the potential threat of older adults disproportionately benefiting from public programs. For example, opinion poll data show that younger Americans report greater support for increased spending on Social Security than do older persons, while older adults are most likely to favor increased spending on education (Street &

Cossman, 2006). Further, most Americans support Medicare and Social Security; a 2011 survey found that nearly 90 percent feel that both programs are “good for the country.” However, a 2015 Gallup poll found that two-thirds of Americans say Social Security is in a state of crisis or has major problems (Newport, 2015). Americans appear to recognize that the old and young generations are not in competition; rather, benefits provided to one generation may help the other.

# Who Will Care for Older Adults When They Become Unable to Care for Themselves?

When older adults become too ill, frail, or mentally impaired to care for themselves, they will require assistance from a family member, friend, or paid caregiver. Family members shoulder the lion’s share of responsibility, yet shrinking family sizes mean that older adults have fewer children upon whom they can rely. Often their children live far away or lack the wherewithal to provide parent care. Time-consuming caregiving can overwhelm caregivers’ physical and mental health. Care work also takes a financial toll. Especially in places like the United States, with few public supports for caregivers, working-age family caregivers (especially women) cut back on paid work and see their earnings and pensions diminish in the process. AARP (2020) estimates average income losses of $5,000 annually in the United States., with women especially vulnerable to these losses. Caregivers also bear direct costs, like paying for home modifications (e.g., putting a ramp in an aged parent’s house), food, cleaning supplies, toiletries, and other purchases for the care recipient. Even small expenses can add up, like the gas and parking fees for driving an aged relative to their medical appointments. That’s why an estimated 25 percent of family caregivers in the United States take out loans or credit card debt to meet their caregiving roles, with 10 percent reporting that they’re unable to meet their own monthly expenses (AARP, 2020).

Older adults without family or whose care needs are too complex for family caregivers may require paid assistants. Yet paid caregivers are in dangerously short supply, a crisis that was exacerbated by Covid-19. The pandemic left many care workers exhausted, demoralized, and anxious to

find other work. In 2020, about 4.6 million Americans were employed as direct care workers, including home health aides, nursing assistants, and personal care workers. According to the U.S. Bureau of Labor Statistics (2022d), home health aides and personal care workers top the list of occupations expected to grow in the coming years, with more than 1 million new job openings projected in the next decade. Yet this statistic is a dramatic *underestimate* as it counts only those caregivers hired by companies; if the estimate also includes caregivers hired directly by families and patients, more than 7 million workers will be needed by 2026 (Paraprofessional Healthcare Institute, 2021). Despite this desperate need for care workers in the United States, the pay is dismal—just $27,000 per year or about $13.50 per hour. Immigrant, Black, and Hispanic women make up the majority of care workers, and about 15 percent live in poverty. It's hard to entice new employees to a job that is exhausting, stressful, sometimes physically dangerous, and low paying, and offers no pathway to advancement or upward mobility (Osterman, 2017).

How can this crisis be managed? Increasing the pay or benefits could entice more people to become paid caregivers. These strategies might include providing training and opportunities for advancement as "universal workers," or direct care professionals who learn skill sets that give them flexibility to work in different care sites (home health, nursing homes, and so on). Other possible solutions include recruiting experienced family caregivers into paid caregiver jobs, or encouraging retired health care providers to volunteer or work part-time as direct care providers. Experts also propose changing immigration policy to welcome more paid caregivers to the United States. Expanding guest worker programs, and making more visas available for elder caregivers—just as cultural exchange visas are available to au pairs who care for children under age 18—can help expand the pipeline of paid caregivers (Stone & Bryant, 2021).

Americans have been reluctant to embrace robots as caregivers—a trend that has taken off in Japan. However, the pandemic has heightened the recognition that technology can be an important lifeline, especially for homebound people. A 2017 survey found that while 70 percent of adults believe that robot caregivers would ease the burden of elder care, just 40 percent say they would ever consider using them. However, during the Covid pandemic, long-term care facilities throughout the United States

increased their reliance on robots, while some local departments of elderly affairs distributed robotic pets to homebound older adults, who felt less alone as they cuddled their new electronic (yet surprisingly lifelike) cats and dogs (Samuel, 2020). Despite their potential, high-tech innovations and robots—like other scientific advances—might be out of reach to economically disadvantaged older adults.

# How Will Nations of the World Cope with Global Aging?

A "gray tsunami" is sweeping the world today. According to the United Nations, in 1950, there were 129 million persons age 65 and older on the planet, or 5 percent of the world population; by 2021, this number had jumped to 673 million—almost 10 percent of the world population (World Bank, 2022j). The United Nations projects that the older population will more than double by 2050 to 1.5 billion, composing nearly 16 percent of the global population (UN Department of Economic and Social Affairs [DESA], 2017b). The world's average life expectancy grew from age 47 in 1950 to age 73 in 2019 and will reach age 77 by 2050 (He et al., 2016; WHO, 2019b).

The extent to which nations are "graying" varies widely. Adults 65 and older made up 29 percent of the population in Europe and North America in 2019; this proportion is projected to drop to 19 percent by 2050 (UN DESA, 2019a). The percentage of people age 65 and older in less developed nations is considerably lower due to three important factors that suppress life expectancy: poverty, disease, and malnutrition. In 1950, less than 4 percent of the population in less developed countries was age 65+. As of 2018, that proportion had risen slightly to 4 percent and is projected to reach 14 percent by mid-century (UN DESA, 2017b; World Bank, 2019c).

Global aging, such as the graying of the U.S. population, is largely a women's issue worldwide. In 2017, for every 100 women age 65 and older, there were 80 men, and for every 100 women age 80 and over, there were only 54 men. These patterns are due primarily to women's life expectancy advantage in most nations of the world. The Central Intelligence Agency (2013) has identified just 12 nations where older men outnumber older women: These generally are places that have

higher maternal mortality rates, lower levels of schooling among women, and higher levels of gender oppression.

Just as population composition varies starkly worldwide, the experiences of older adults in lower-income nations differ tremendously from those of their peers in wealthier nations. Retirement is “an unaffordable luxury” for most older adults in Africa and many in Latin America and parts of Asia (Bremner et al., 2010). Four out of five older adults worldwide receive no retirement income from pensions or government entitlement programs. Many must continue to work or rely on their families for financial support. Some work in the informal economy, such as by selling products in street markets or working on farms with no benefits or health protection.

Although children and grandchildren historically have cared for their aging parents and grandparents, this support is eroding in some parts of the world. For example, in many parts of Africa, young people are moving to urban areas to work, while others are dying prematurely due to HIV/AIDS, and others still are grappling with their own poverty and cannot support their parents. As a result, many older adults are left to take care of themselves. These challenges are compounded by the fact that many frail older adults unexpectedly find themselves as caregivers to their grandchildren, when their own children (that is, the grandchildren’s parents) have died due to ravages such as the AIDS, Covid-19, and opioid epidemics (Carr, 2023).

In China, the constitution stipulates that "children who have come of age have the duty to support and assist their parents." In a recent case, a judge ordered a woman to visit her mother (pictured) at least once every two months.

Worldwide, population aging has enormous implications for social policy. By 2050, demographers predict that there will be just two working-age adults per older adult in high-income nations, four in middle-income nations, and eight in low-income nations (UN DESA, 2017b). Countries vary widely in what they are doing to cope with their growing numbers of older people. More than 150 nations currently provide public assistance for people who are older or disabled, or for their survivors when they die. As we have seen already, the United States relies primarily on Social Security and Medicare to serve the financial and health needs of older adults. Other industrial nations provide a much broader array of services.

In Japan, one of the oldest nations in the world, 29.8 percent of people are now 65 and older (UN DESA, 2019a). Many older adults remain active well into old age because the Japanese culture encourages this activity and because business policies often support post-retirement work with the same company one worked for before retirement. A number of national laws in Japan support the employment and training of older workers, and private businesses also support retraining (Statistics Bureau Japan, 2015). Japan also has been an innovator in using technologies, like

robotic caregivers, to do tasks like lifting frail older adults out of their bed and into a wheelchair, easing them into bathtubs, and assisting with basic communication.

Societies that have large extended families and practice ancestor worship historically have been more likely to treasure their elders, honoring them at public events and seeking their counsel in political matters. East Asian nations, in particular, have a tradition of following the Confucian teaching of filial piety. Children care for their parents in old age out of gratitude for the care they received when young (Sung, 2000). As a result, parents historically have lived with, and are cared for by, their children when they are no longer able to care for themselves (Cowgill, 1968; Falk et al., 1981).

This pattern of parent-child co-residence in Asia is starting to fade, however, due to economic development and globalization. Economic development in wealthier Asian nations now enables older adults to live on their own, if they choose to do so. For example, improvements in the health and financial status of older persons now enable Japanese older adults to maintain their own homes and the desirable status of "intimacy at a distance" (Kumagai, 2010).

Globalization also has altered the treatment and status of the aged population throughout the world (Cowgill, 1986; Foner, 1984; Fry, 1980; Holmes, 1983). As previously agrarian societies become part of the emerging global economy, traditional ways of thinking and behaving are likely to change. For example, adult children in China are now abandoning their rural villages to seek jobs in urban regions. Yet these moves often mean leaving behind their aging parents, who are responsible for supporting themselves, often by working in arduous agricultural jobs. Although economic conditions require that children move, cultural beliefs still condemn such moves. In one high-visibility case from 2006, a 60-year-old Chinese widow successfully sued her son and daughter for abandonment. The courts ruled that she was allowed to live with her daughter and obliged her son to pay her monthly support (French, 2006).

The combination of graying and globalization will shape the lives of older people throughout the world well into this century. Traditional patterns of family care will be challenged as family-based economies continue to give way to labor on the farms and in the offices and factories

of global businesses. Like the industrial nations earlier in the twentieth century, all societies will be challenged to find roles for their aging citizens. This challenge will include identifying new means of economic support, often financed by government programs. It will also entail identifying ways to incorporate rather than isolate older persons, by drawing on their considerable reserves of experience and talent.

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**CONCEPT CHECKS**

1. **What is generational equity?**
2. **Describe the debate surrounding the future of Social Security and Medicare programs in the United States.**
3. **What are the implications of the graying world population for social policy?**
4. **What are possible solutions to the caregivers shortage?**

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# Glossary

old-age dependency ratio
: The number of people ages 65 and older, divided by the number of persons ages 18 to 64.

AARP
: U.S. advocacy group for people age 50 and over; formerly the American Association of Retired Persons.

generational equity
: The striking of a balance between the needs and interests of members of different generations.

# THE BIG PICTURE

# Chapter 12

## Aging

**Exercises:** Thinking Sociologically

1. Briefly discuss the competing theories about growing old that are presented in this chapter. How do these theories compare with each other? Which theory do you feel is most appropriate to explain aging, and why do you feel this way about that theory?
2. What do you think the United States could do socially and politically to alleviate the problems of aging for its older citizens? How likely is it that your suggestions for alleviating the problems of age could be adopted into the American political process, and why?

# BASIC CONCEPTS p. 432

## Learning Objectives

Learn some basic facts about the increase in the proportion of the U.S. population that is age 65 and older. Recognize that aging is a combination of biological, psychological, and social processes. Understand how technological advances affect each of the three aging processes.

## Terms to Know

graying • older adults • population aging • social gerontology • aging • Alzheimer's disease • social aging

## Concept Checks

1. What is the "graying" of the U.S. population?
2. Compare and contrast biological, psychological, and social aging processes.
3. How has technology affected the processes of biological, psychological, and social aging?

# GROWING OLD: THEORIES OF AGING p. 439

## Learning Objectives

Understand key theories of aging, particularly those that focus on how society shapes the social roles of older adults and that emphasize aspects of age stratification.

## Terms to Know

disengagement theory • socioemotional selectivity theory • activity theory • continuity theory • conflict theories of aging • life course

## Concept Checks

1. Summarize the three theoretical frameworks used to describe the nature of aging in U.S. society.
2. What are the main criticisms of functionalism and conflict theory?
3. What are three themes of the life course perspective?
4. Describe the processes of cumulative adversity and advantage over the life course.

# RESEARCH ON AGING IN THE UNITED STATES TODAY p. 443

## Learning Objectives

Evaluate the experience of growing old in the United States and how this experience is shaped by race, social class, gender, and birth cohort.

## Terms to Know

young old • old • oldest old • cohort • Social Security • Medicare • emotional loneliness • social loneliness • ageism

## Concept Checks

1. Contrast young old, old, and oldest old persons.
2. Describe four common problems older Americans often confront.
3. What characteristics differentiate older adults who are emotionally and physically well from those who face great distress in later life?

# UNANSWERED QUESTIONS: THE SOCIAL, POLITICAL, AND ECONOMIC IMPACT OF POPULATION AGING p. 457

## Learning Objectives

Understand and analyze the politics of generational equity. Assess the social issues of graying on a global level.

## Terms to Know

old-age dependency ratio • AARP • generational equity

## Concept Checks

1. What is generational equity?
2. Describe the debate surrounding the future of Social Security and Medicare programs in the United States.
3. What are the implications of the graying world population for social policy?
4. What are possible solutions to the caregivers shortage?

# Glossary

graying
: A term used to indicate that an increasing proportion of a society's population is over 65.

older adults
: Adults ages 65 and older.

population aging
: The relatively faster growth of the older population compared to the younger population and the resulting shifts in the age distribution of the population toward older ages. Population aging is commonly measured as an increasing median age or a rising share of the population above a certain age, such as 65.

social gerontology
: The study of aging and older adults.

aging
: The combination of biological, psychological, and social processes that affect people as they grow older.

Alzheimer's disease
: A degenerative disease of the brain resulting in progressive loss of mental capacity.

social aging
: The norms, values, and roles that are culturally associated with a particular chronological age.

disengagement theory
: A functionalist theory of aging that holds that it is functional for society to remove people from their traditional roles when they become older adults, thereby freeing up those roles for others.

socioemotional selectivity theory

The theory that adults maintain fewer relationships as they age, but that those relationships are of higher quality.

activity theory

A functionalist theory of aging that holds that busy, engaged people are more likely to lead fulfilling and productive lives.

continuity theory

The theory that older adults' well-being is enhanced when their activities are consistent with their personality, preferences, and activities earlier in life.

conflict theories of aging

Arguments that emphasize the ways in which the larger social structure helps shape the opportunities available to older adults. Unequal opportunities are seen as creating the potential for conflict.

life course

The various transitions and stages people experience during their lives.

young old

Sociological term for persons age 65 to 74.

old

Sociological term for persons age 75 to 84.

oldest old

Sociological term for persons age 85 and older.

cohort

A group of individuals who were born during the same time period, and thus share a similar pattern of historical experiences from childhood to adult life.

Social Security

A federal program in the United States that provides retirement benefits and disability income to qualified people and their spouses, children, and survivors.

Medicare

A program under the U.S. Social Security Administration that reimburses hospitals and physicians for medical care provided to qualifying people over 65 years old.

emotional loneliness

The absence of an intimate confidant.

social loneliness

The absence of a broader social network.

ageism

Discrimination or prejudice against a person on the grounds of age.

old-age dependency ratio
: The number of people ages 65 and older, divided by the number of persons ages 18 to 64.

AARP
: U.S. advocacy group for people age 50 and over; formerly the American Association of Retired Persons.

generational equity
: The striking of a balance between the needs and interests of members of different generations.

# 13 Government, Political Power, and Social Movements

The Economist Intelligence Unit rates nearly all countries on the degree of democracy that is present, based on such factors as political rights and civil liberties, the right to vote, freedom of expression, free media, and political participation. Here is a challenge: Which one of these five countries has the highest freedom score? The lowest? How did you make your choice?

1. **Norway**
2. **United States**
3. **Costa Rica**
4. **Taiwan**
5. **Canada**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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## LEARNING OBJECTIVES

1. **Basic Concepts** Understand basic ideas underlying modern nation-states and social movements. Learn about different types of democracy.
2. **Who Rules? Theories of Democracy** Learn the key theories about power in a democracy.
3. **Recent Research on U.S. Politics and Social Movements** Learn about some of the trends associated with modern-day democracy. Assess the effect of globalization and technology on social movements today. Learn about nationalism and the importance of nationalist movements.
4. **Unanswered Questions** Understand why voter turnout in the United States is low and consider the role that the internet played in the 2020 election. Evaluate whether democracy is in trouble.

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According to the Economist Intelligence Unit's (2021) annual Democracy Index, Norway is ranked as the most democratic country in the world, followed by New Zealand, then the other Nordic countries (Finland, Sweden, Iceland, and Denmark). The United States? Only 26th, behind Spain and Chile. In fact, democracy in the United States was rated as "flawed" rather than "full." Taiwan, by way of comparison, was ranked 8th; Canada, 12th; Costa Rica, 20th. A decade ago, the United

States was ranked 19th, a “full democracy.” (The Nordic countries and New Zealand topped the list then, as well.)

Why has the United States declined to 26th, even though it received high marks on such indicators as electoral process and pluralism, political participation, and civil liberties? The Democracy Index noted that the United States is currently facing significant challenges to its democratic institutions. These include widespread political polarization, a lack of trust in politics, dysfunctional government, increasing threats to freedom of expression, and attacks on the legitimacy of elections, which have undermined confidence in the electoral system. We will discuss all these issues later in this chapter.

What difference does it make whether a country has a high “democracy score,” indicating that its citizens enjoy robust political rights and civil liberties? The answer is that it clearly matters how the decisions are made that affect citizens’ lives. Furthermore, most people (and their governments) at least profess to believe that people should enjoy basic political and social freedoms. The second paragraph of the Declaration of Independence famously says:

> We hold these truths to be self-evident, that all men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the pursuit of Happiness.—That to secure these rights, Governments are instituted among Men, deriving their just powers from the consent of the governed.

In this chapter we will consider the institutional successes and challenges in realizing these lofty goals. While we will focus primarily on the United States, we will also consider the degree to which increased freedom is being realized—or eroded—around the world. In politics, as we shall see, both power and influence play a role. We will also look at the role of social movements in the world today—efforts by groups of people to achieve shared goals when they believe that efforts to successfully influence their governments, through conventional means such as voting or writing their representative, are at best limited or at worst nonexistent.

# Glossary

social movements

Large groups of people who seek to accomplish, or to block, a process of social change. Social movements normally exist in conflict with organizations whose objectives and outlook they oppose. However, movements that successfully challenge power, once they become institutionalized, can develop into organizations.

# 1 BASIC CONCEPTS

**Understand basic ideas underlying modern nation-states and social movements. Learn about different types of democracy.**

## Democracy

A democracy is a political system that allows the citizens to participate in political decision making or elect representatives to government bodies, enabling them to directly or indirectly decide the laws under which they will live. The word *democracy* has its roots in the Greek term *demokratia*, from *demos* (people) and *kratos* (rule). It refers to a political system in which the people rule. But what does it mean to be "ruled by the people"? Many questions can be raised about this seemingly obvious phrase (Held, 2006).

Regarding the "people," who exactly are they? Everyone? Only people who are affected by the decisions? What should be the proper voting age? What about people who are currently in jail or once were? What about people who are not citizens but who have lived in the country for years and have a strong stake in any decisions that might affect them? What if there are strong differences of opinion among "the people"—how are the rights of the minority protected? What about people who choose not to participate or who find it difficult to participate, because of work or family obligations or lack of understanding of complex issues?

Regarding "rule," how, exactly, is it exercised? By periodic voting? Actual participation in all decisions that might affect one's life? Does "rule" refer only to government decisions or to other spheres of life as well, such as the economy? Does it encompass the daily administrative decisions of governments, or should it refer only to major policy decisions? Are all rules equally binding? Should rule breaking be punished, and, if so, how severely? How much (and what forms of) dissent should be tolerated? If some people believe that the rules are unjust, do they have the right to disobey them?

Answers to these questions have varied over time in all societies, including the United States, where "the people" have been variously understood as White men, owners of property, and adult men and women. The right to vote is not provided in either the U.S. Constitution (ratified in 1788) or the Bill of Rights (1791); that power was left to the states. At the time the country was founded, in most states only adult White males had the right to vote; by some estimates, property ownership requirements restricted that vote to half of all White males. While a few states granted freed American-born enslaved people the right to vote when the Constitution was ratified (Curtis, 1857), Black men were guaranteed the right to vote only with the ratification of the Fifteenth Amendment to the Constitution in 1870 (women of any race did not get the right to vote in presidential elections until the Nineteenth Amendment was ratified in 1920).

From 1870 until the mid-1890s, Black men in the South possessed a limited ability to exercise their newly granted franchise; some even held elective offices. But so-called Jim Crow laws—state and local statutes such as excessively strict literacy requirements—soon made it all but impossible for Black men to vote. And the Supreme Court's 1896 *Plessy v. Ferguson* decision, which legalized "separate but equal" facilities for Black and White citizens, ensured that racial segregation would keep Blacks as second-class citizens. For more than a half century, Blacks were excluded from "Whites only" public education, restaurants, housing and lodging, and even toilet facilities. Only after a long fight for basic civil rights, culminating in the Black-led civil rights movement of the 1960s, was discrimination on the basis of race, color, religion, sex, or national origin outlawed with the passage of the 1964 Civil Rights Act. The 1965 Voting Rights Act went further and abolished restrictions on voting.

For a country to be judged a true democracy today, it must ideally hold free and fair elections; enable its citizens to participate in politics and other forms of civic life; protect its citizens' human rights, including their right to criticize the government; and guarantee the rule of law (Diamond, 2004; see also Diamond, 2008, p. 22, for an expanded list). That said, democracies can take a number of different forms (we will mention only three).

Participatory democracy (sometimes called "direct democracy" or "pure democracy") exists when decisions are made communally by those

affected by them. This was the original type of democracy practiced in ancient Athens, where the citizens, constituting a small minority of Athenian society (women and slaves were excluded), regularly assembled to consider policies and make major decisions. Participatory democracy has limited importance in modern societies, where the mass of the population has political rights, rendering it impossible for everyone to participate face-to-face in the making of all the decisions that affect them. Yet some facets of participatory democracy do play a part in modern societies. Some New England towns still hold annual town hall meetings that are a form of participatory democracy. The holding of a referendum, whereby the majority expresses its views on a particular issue, is another form of participatory democracy. Direct consultation of large numbers of people is made possible by simplifying the issue to one or two questions to be answered. Referenda are employed frequently on a state level in the United States to decide controversial issues, such as the legalization of marijuana.

Many states have held referenda, a form of participatory democracy whereby the entire electorate votes on a particular proposal, on hot-button issues such as marijuana legalization and the death penalty.

Representative democracy is a much more realistic approach to engaging citizens in modern societies. This is a form of democracy in which citizens elect to governing bodies representatives who then vote on laws and policies. Countries in which voters can choose between two or more political parties, and in which the majority of the adult population has the right to vote, are a type of representative democracy called liberal democracy. Based on one recent study, nearly half of the world's population currently lives in liberal democracies, although the large majority of these were determined to be "flawed" democracies that had "problems in governance, an underdeveloped political culture and low levels of political participation" (Economist Intelligence Unit, 2020). Paradoxically, some liberal democracies still retain vestiges of monarchy, which historically has meant rule by unelected kings or queens. Today these governments are in fact constitutional monarchies, where the king or queen is a monarch in name only; actual power is severely restricted by the countries' constitutions, which vest authority in the elected representatives of the people. Examples of such monarchs include the kings of England and Sweden, or the emperor of Japan.

For a liberal democracy to work, representatives must be elected freely and fairly. It is important to realize that elections are not always free and fair, nor do elections occur only in democracies. Authoritarianism is a system of governance that concentrates power in the hands of a single person (or sometimes a small elite) who is not responsible to the country's citizens or bound by the rule of law. Authoritarian leaders often hold constitutionally mandated elections in order to cast a veneer of legitimacy over their government. In 2018, Egyptian president Abdel Fattah al-Sisi was reelected with 97 percent of the vote in an election where the main opposition candidate was arrested and all other viable opposition candidates withdrew, claiming intimidation and calling for a boycott of the election (only 41 percent of the electorate even bothered to vote). Numerous human rights groups denounced the election as "farcical" (BBC News, 2018; Davison & Tolba, 2018). In Russia's 2021 parliamentary election, United Russia, the party backing Russian president Vladimir Putin, won 72 percent of the seats, a supermajority that enables Putin to alter the constitution. His main opposition leader, Alexei Navalny, nearly died after being poisoned by Russian federal agents. During the election Navalny languished in jail, along with other opposition leaders. Ballot stuffing and other forms of voter fraud were reportedly widespread (Cordell, 2021).

# The Global Rise of Populist Authoritarianism

In recent years, there has been a turn toward what has been described as "populist authoritarianism" in many countries, including European countries, Asian countries such as China and India, and even the United States. Populist authoritarianism is both a philosophy and a style of governance characterized by forceful leadership that typically seeks to suppress political rights and civil liberties in the interest of greater national security. As the term suggests, it combines authoritarianism with populism, the belief that politics should reflect the will of "the people" against that of "corrupt elites" (Sengul, 2019); "the people" are typically perceived as a country's racial or ethnic majority, usually the ethnic group seen as having founded the country. Populism is therefore strongly nationalistic, anti-immigrant, opposed to multiculturalism, and distrustful of globalization, which is seen as undermining national culture and destabilizing the national economy. Populism holds that "the people" should rule at any cost, even if it means overriding the rights of minorities, expert opinion, constitutional checks and balances, and the rule of law. Populist leaders seek to connect directly with their followers through mass rallies, television, and—increasingly—social media (Norris & Inglehart, 2018). Populist authoritarianism is becoming a significant challenge to liberal democracy in many countries.

One comprehensive effort to measure the global extent of democracy and the rise of populist authoritarianism, the previously mentioned Democracy Index, assigns an overall democracy score to every country for which it has sufficient information (Economist Intelligence Unit, 2020). This score is based on 60 measures that are organized into five categories: electoral process and pluralism, civil liberties, the functioning of government, political participation, and political culture. Among the 167 countries in the study, only 21 (representing a mere 6.4 percent of the world population) receive sufficiently high scores on all five measures to qualify as "full democracies." As previously noted, Norway is at the top of this category. An additional 53 countries (39.3 percent of the world population) are classified as "flawed democracies." These are countries that have free and fair elections, although media freedom may be restricted, political culture and participation are weak, and there are problems with governance. France leads this category, falling just short

of being rated a “full democracy,” and is closely followed by the United States. Thirty-four countries (17.2 percent of the world population) are classified as “hybrid regimes”: These countries may have elections, but the government seeks to restrict opposition parties and candidates, the rule of law is weak, corruption is widespread, civil society is weak, journalists are harassed, and the courts are not independent. Bangladesh and Tunisia top this list, coming close to being rated as merely “flawed democracies.” Finally, 59 countries (37.1 percent of the world population) are classified as “authoritarian regimes,” which lack a functioning democracy: If elections are held, they are not free and fair; media are state owned or controlled by the state; dissent is not allowed and critics of the government are incarcerated or killed; and there is no independent judiciary to offer a check on the system. At the top of this list are Palestine and Kuwait, falling close to being rated as “hybrid regimes”; Russia and China also fall into this category. At the very bottom, the most authoritarian countries in the world, according to the Democracy Index, are Chad, Turkmenistan, Syria, the Central African Republic, the Democratic Republic of the Congo (its name notwithstanding), North Korea, Myanmar, and Afghanistan.

The study also found that although political participation has increased globally over the past decade, as seen in high voter turnout, mass marches, and protest demonstrations, there has been an overall decline in electoral pluralism and effective governance. The biggest decline in the past two years, however, has been a widespread loss of civil liberties. While in some countries this was due to tighter governmental controls over political dissent, in most cases it was the result of policies taken to combat Covid-19, such as mandatory lockdowns, quarantine and social-distancing requirements, mask mandates, and other public health measures that countries instituted to save lives and slow the spread of the pandemic. These policies helped reduce the threat of hospitalization and death resulting from Covid-19 but have been relaxed in most countries. But this scenario highlights an important tradeoff all democracies face—how best to balance individual freedom with the need to provide public security. This tradeoff has contributed to political polarization in the United States and many European democracies.

Functioning democracies such as Hungary, Turkey, the Philippines, and (until its most recent election) Brazil have all had populist leaders who eroded democratic institutions. Many more countries—including the

United States—have seen the rise of populist movements. The reasons for this are many and debated: globalization, which has resulted in job loss in advanced industrial countries and growing inequality between and within countries; the influx of immigrants into Europe and the United States from war-torn and impoverished countries, which has fueled the rise of anti-immigrant nationalism; and the internet, which has enabled populist leaders to more effectively and easily build political movements through social media. We will return to these issues in the final section of this chapter.

# The Concept of the State

When we say "the people rule," we are typically referring to rule over an entity called a nation-state—an entity composed of a nation (people with a common identity that ideally includes shared culture, language, and feelings of belonging) and a state (a political apparatus or government that rules over a territory). A modern state claims a specific territory and includes institutions such as a congress or parliament, a president or prime minister, judges, and other public officials; its authority is often backed by a legal system and the ability to use military force to implement its policies.

## Characteristics of the State

**Sovereignty** The territories ruled by traditional states were poorly defined, the level of control wielded by the central government being quite weak. The notion of national sovereignty—that a government possesses authority over an area with clear-cut borders, within which it is the supreme power—is a relatively modern one. All modern nation-states are sovereign states. Failed states exist when the central government has lost authority over large parts of its national territory and resorts to the use of deadly force, often against civilian populations, in an effort to retain some degree of power. Examples today include Chad, the Democratic Republic of the Congo, Somalia, Sudan, and Yemen.

**Nationalism** Nation-states are associated with the rise of nationalism, which can be defined as a set of symbols and beliefs that creates a sense of membership in a single political community—such as being American, Canadian, or Russian. Although people may have always identified with

their family, village, or religious community, nationalism appeared only with the development of the modern state. It is the main expression of identity with a distinct political community.

Nationalistic loyalties do not always fit the physical borders marking nations' territories. Because all nation-states comprise communities of diverse backgrounds, local nationalism frequently arises in opposition to that fostered by the state—such as nationalist feelings among the French-speaking population in Québec, Canada. While the relation between the nation-state and nationalism is complicated, the two are part of the same process. (We will return to nationalism when we explore its effect on international politics.)

**Power, Authority, and Influence** For states to operate effectively, they must have power—the ability of individuals or groups to make their own interests or concerns count, even when others resist. Power, therefore, sometimes involves the use of force. Power is present in almost all social relationships: between parent and child, professor and student, employer and employee. The exercise of power is, in turn, almost always accompanied by belief systems that justify its use. Authority is a form of power that is seen as rightfully exercised, or (to use a term preferred by sociologists and political scientists) "legitimate." Those who view a government's authority as legitimate voluntarily consent to it. Contrary to what many believe, democracy is not the only type of legitimate government. Dictatorships can have legitimacy as well, as can states governed by religious leaders.

Influence refers to the ability to affect others' behavior without coercion or other forms of direct control. Individuals and groups can influence politics in a variety of ways: Respected community members often play a role in local issues; prominent epidemiologists shape the national response to pandemics; well-funded think tanks influence national economic policy; campaign contributions influence politics at all levels. Social movements operating outside the traditional political arena, which we discuss later in this chapter, also can be highly influential. The social movements of the 1960s and 1970s hastened the passage of civil rights legislation and helped turn public opinion against the Vietnam War; Black Lives Matter has focused attention on racial inequities in policing; the global environmental movement has raised public awareness of the urgent need to address the causes of climate change, which is now being

addressed by governments around the world (how adequately, of course, is a matter of debate; see Chapter 19).

Instagram and TikTok have greatly expanded the ability of celebrities (as well as teenagers) to become so-called influencers. Portuguese soccer player Cristiano Ronaldo (Manchester United) leads the pack of Instagram influencers with 370 million followers. Kylie Jenner, the most-followed woman (285 million followers), claimed to be the world's youngest self-made billionaire at age 21, thanks to her influence in the fashion world (and her lines of cosmetics and clothing). Whether such influence extends to the world of politics is unclear: Caitlyn Jenner (no relation to Kylie) had hoped her celebrity status, buoyed by 12 million Instagram followers, would enable her to win the governorship of California if Gavin Newsom was recalled in a 2021 election. He wasn't recalled; she got only 1 percent of the votes cast, among dozens of candidates hoping to be governor if the recall was successful.

**Citizenship** Before the emergence of modern societies, most people lacked awareness of, or even interest in, those who governed them; moreover, they had no political rights or influence. Normally, only the dominant classes or richest groups felt a sense of belonging to a political community. In modern societies, by contrast, most people living within the borders of the political system are citizens, individuals having common rights and duties, who know they are members of a common national community (Brubaker, 1992). Although some people are political refugees or are "stateless," almost everyone in the world today identifies as a member of some national political order.

**Citizenship Rights** Three types of rights are associated with citizenship (Marshall, 1973). First, civil rights are rights of the individual as established by law; these include privileges that took a long time to achieve and are not fully recognized in all countries. Examples are the freedom of individuals to live where they choose, freedom of speech and religion, the right to own property, and the right to equal justice before the law. These rights were not fully established in most European countries until the early nineteenth century, and not all groups were allowed the same privileges. Although the U.S. Constitution granted such rights to Americans well before most European states had them, as we have previously noted, Blacks were excluded until 1870. Even after Blacks legally obtained these rights, they were unable to exercise them and were ensured full legal equality only with the passage of the Civil

Rights Act of 1964—and then only because of more than a decade of marches, demonstrations, and nonviolent civil disobedience led by Dr. Martin Luther King Jr. and countless others in the civil rights movement (Branch, 1989).

Civil rights demonstrators march in 1964 in St. Augustine, Florida. Civil rights include the right to own property and the right to a fair trial.

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Women were also denied many civil rights; at the turn of the nineteenth century in the United States, women had few rights independent of their husbands. They could not own property, write wills, collect an inheritance, or even earn a salary. Throughout the nineteenth century, states slowly and gradually began affording such rights to women, regardless of their marital status (Speth, 2011).

The second type of citizenship rights consists of political rights, especially the right to participate in elections and run for public office. Again, these rights were not won easily or quickly. In the United States, as we have seen, the achievement of full voting rights even for all men is relatively recent.

In most Western countries, the vote for women was achieved partly through the efforts of women's movements and partly as a consequence of women entering the formal economy early in the twentieth century, during World War I. As recently as September 2011, Saudi Arabia's King Abdullah officially granted women the right to vote and run in local elections.

The third type of citizenship rights consists of social rights—the right of every individual to enjoy a minimum standard of economic welfare and security. Social rights include sickness benefits, unemployment benefits, and a guaranteed minimum wage—in other words, welfare provisions. In most societies, social rights developed last because the establishment of civil and political rights underpinned the fight for social rights. Social rights have been won largely as a result of the political strength that poorer groups have been able to develop after obtaining the vote.

Social rights are typically achieved through a welfare state, which exists when government organizations provide material benefits for citizens. Some of these benefits are intended to help those who cannot support themselves adequately through paid employment—the unemployed, the sick, the disabled, and the elderly. Many benefits go to the middle class as well: free or low-cost public education from kindergarten through state colleges and universities (although the cost of the latter is rapidly rising in many states), freeways, and Social Security, to name a few examples. In Western countries, an extensive welfare state has been considered the ideal expression of citizenship rights for more than half a century; however, in many poorer countries, welfare benefits, especially for the poor, are virtually nonexistent.

Although an extensive welfare state was seen as the culmination of the development of citizenship rights, in recent years, welfare states have come under pressure from increasing global economic competition and the movement of people from poorer, often war-torn, countries to richer ones. As a result, the United States and some European countries have sought to reduce benefits to noncitizens and to prevent new immigrants from entering their borders. For example, for many years the U.S. government has patrolled its border with Mexico and constructed walls of concrete and barbed wire in an attempt to keep undocumented immigrants out of the country. Since 2015, 2.2 million refugees from civil war and religious violence in Syria, Afghanistan, Iraq, and other countries fled their homelands and sought asylum in Europe, straining

resources and provoking an anti-immigrant backlash among some segments of the European population (UN High Commissioner for Refugees, 2021). Citizenship, and the bundle of rights and privileges accompanying it, serves as a powerful instrument whereby prosperous nation-states have attempted to exclude the migrant poor from the status and the benefits that citizenship confers. Concern over immigrants was one of the driving forces behind the 2016 British vote to leave the European Union (the so-called Brexit) and contributed to Donald Trump's electoral victory in the 2016 U.S. presidential race (during the campaign, one of Trump's promises was to "build a wall" between the United States and Mexico and make Mexico pay for it).

Social change sometimes occurs outside the established political system. Revolutions occur when desired changes cannot be achieved within the system and an existing political order is overthrown by means of a mass movement, often using violence (Foran, 1997, 2005). Yet revolutions occur relatively infrequently. More commonly, political change is achieved through social movements, which are as evident in the contemporary world as are the formal, bureaucratic organizations they often oppose. Many contemporary social movements are international and utilize information technology in linking local campaigners to global issues.

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**CONCEPT CHECKS**

1. **Why is participatory democracy not a viable option for most modern states?**
2. **Describe three characteristics of the state.**
3. **What is the welfare state? Can the United States be classified as a welfare state? Why?**

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# Glossary

democracy
: A political system that allows the citizens to participate in political decision making or elect representatives to government bodies,

enabling them to directly or indirectly decide the laws under which they will live.

participatory democracy
: A system of democracy in which all members of a group or community participate collectively in making major decisions.

representative democracy
: A form of democracy in which citizens elect to governing bodies representatives who then vote on laws and policies.

liberal democracy
: A type of representative democracy in which elected representatives hold power.

monarchy
: A system of government in which an unelected king or queen rules.

constitutional monarchy
: A system of government in which a king or queen is largely a figurehead and real power rests in the hands of other political leaders.

authoritarianism
: A political system in which the governing bodies or leaders use force to maintain control.

populism
: The belief that politics should reflect the needs and interests of ordinary people rather than those of elite individuals or groups.

civil society
: The realm of activity that lies between the state and the market, including the family, schools, community associations, and noneconomic institutions. Civil society, or civic culture, is essential to vibrant democratic societies.

nation-states
: Particular types of states, characteristic of the modern world, in which governments have sovereign power within defined territorial areas, and populations are citizens who know themselves to be part of single nations.

nation
: People with a common identity that ideally includes shared culture, language, and feelings of belonging.

state
: A political apparatus (government institutions plus civil service officials) ruling over a given territorial order, whose authority is backed by law and the ability to use force.

sovereignty
: The undisputed political rule of a state over a given territorial area.

failed states
: States in which the central government has lost authority and resorts to deadly force to retain power.

nationalism
: A set of beliefs and symbols expressing identification with a national community.

local nationalism
: The belief that communities that share a cultural identity should have political autonomy, even within smaller units of nation-states.

power
: The ability of individuals or the members of a group to achieve aims or further the interests they hold. Power is a pervasive element in all human relationships. Many conflicts in society are struggles over power, because the amount of power an individual or group holds governs its ability to put its wishes into practice.

authority
: A government's legitimate use of power.

influence
: The ability to affect others' behavior without coercion or other forms of direct control.

citizens
: Members of a political community, having both rights and duties associated with that membership.

civil rights
: Legal rights held by all citizens in a given national community.

political rights
: Rights of political participation, such as the right to vote in local and national elections, held by citizens of a national community.

social rights
: Rights of social and welfare provision held by all citizens in a national community, including, for example, the right to claim unemployment benefits and sickness payments provided by the state.

welfare state
: A political system that provides a wide range of welfare benefits for its citizens.

revolutions

Processes of political change involving the mobilizing of a mass social movement, which, by the use of violence, successfully overthrows an existing regime and forms a new government.

# 2 WHO RULES? THEORIES OF DEMOCRACY

**Learn the key theories about power in a democracy.**

Classical sociology offers three different theories of how modern democracies actually function: democratic elitism theories, which argue that actual governance is by elites who possess the necessary expertise, but who are held accountable to the electorate by means of democratic processes such as voting; pluralist theories, which argue that governance is ultimately shaped by interest groups that compete for influence, providing a democratic form of checks and balances against one another; and power elite theories, which argue that wealthy and powerful elites operate in the background and shape policy in their interest. In none of these three theories do citizens directly govern, or even directly assert power over the government; the average citizen's power is exerted indirectly through elected representatives (see Table 13.1). Power elite theory often questions whether ordinary citizens are able to influence politics at all.

## Democratic Elitism Theories

One of the most influential views of the nature and limits of modern democracy was set out by Max Weber and, in modified form, by economist Joseph Schumpeter (1942/1983). Their ideas are called the theory of democratic elitism.

Weber held that direct democracy is impossible as a means of regular government in large-scale societies—not only for the logistical reason that millions of people cannot meet to make political decisions, but also because running a complex society demands expertise. Participatory democracy, Weber believed, can succeed only in small organizations where the work is straightforward. When complicated decisions or policies are involved, even in modest-sized groups, such as small business firms, specialized knowledge and skills are necessary. Because experts carry out their jobs on a continuous basis, positions requiring

expertise cannot be subject to regular election by people with vague knowledge of the necessary skills and information. Although higher officials, responsible for overall policy decisions, are elected, a large substratum of full-time bureaucratic officials must play a large part in running a country (Weber, 1921/1979). In Weber's view, the development of mass citizenship, which is closely connected with the idea of general democratic participation, greatly expands the need for bureaucratic officialdom. For example, provision for welfare, health, and education requires permanent, large-scale administrative systems.

As this closed-off section of the Capitol suggests, individual citizens have limited ways of participating in a representative democracy.

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Representative multiparty democracy, according to Weber, helps defend against both arbitrary decision making on the part of political leaders (because they are subject to popular elections) and complete usurpation of power by bureaucrats (because elected officials set overall policy). But under these circumstances, the contribution of democratic institutions falls short of achieving pure democracy. "Rule by the people" is possible

in only a very limited sense. To achieve power, political parties must become organized in a systematic way—they must become bureaucratized. "Party machines" then develop that threaten the autonomy of parliaments or congresses in discussing and formulating policies. If a party with a majority representation can dictate policy, and if that party is run by officials who are permanently in control, then the level of democracy is low.

For democratic systems to be effective, Weber argued, two conditions must be met. First, there must be parties that represent different interests and have different outlooks. If the policies of competing parties are basically the same, voters lack any effective choice. Weber held that one-party systems cannot be democratic in any meaningful way. Second, there must be political leaders with imagination and the courage to escape the inertia of bureaucracy. Weber emphasized the importance of leadership in democracy, which is why his view is known as democratic elitism: Rule by elites is inevitable; ideally, they will represent our interests in an innovative and insightful fashion. Parliaments and congresses give rise to political leaders who can counter the influence of bureaucracy and command mass support. Weber valued multiparty democracy more for the quality of leadership it generates than for the mass participation in politics it makes possible.

Joseph Schumpeter (1942/1983) agreed with Weber about the limits of mass political participation and about the importance of democracy as a method of generating effective and responsible government. For Schumpeter, as for Weber, democracy is more important as a method of generating effective and responsible government than as a means of providing significant power for the majority. Democracy, Schumpeter stated, is the rule of the politician, not the people. To achieve voting support, however, politicians must be minimally responsive to the demands and interests of the electorate. Only if there is competition to secure votes can arbitrary rule be avoided.

For elites to truly foster the aims of democracy, apart from being accountable, they must also be competent. They must have sufficient expertise to manage the many challenges governments face today, whether those challenges involve economics, politics, the environment, or, as Covid-19 vividly demonstrated, global pandemics. Yet there is a long list of U.S. elected officials who were known only for their celebrity status before they were elected to governmental positions. Examples

include movie star Clint Eastwood (mayor of Carmel, California, 1986–1988), *Saturday Night Live* comedian Al Franken (U.S. senator from Minnesota, 2009–2018), NBA Hall of Famer Bill Bradley (U.S. senator from New Jersey, 1979–1997), and bodybuilder-turned-movie-star Arnold Schwarzenegger (California governor, 2003–2011). Two media celebrities even became president: movie star Ronald Reagan (1981–1989) and TV personality Donald Trump (2017–2021). Celebrities can leverage their outsize influence, garnered through film, television, and now social media, into successful political careers. Nor is the United States alone in elevating actors to the presidency: Volodymyr Zelensky, a comedian who played the role of a schoolteacher-turned-president in a Ukrainian sitcom, was elected to the presidency of that country in 2019. Whether celebrity leadership is ultimately good or bad for democracy is understandably a matter of debate (Archer & Cawston, 2022).

# Pluralist Theories

While pluralists accept that individual citizens can have little or no direct influence on political decision making, they argue that the presence of interest groups can limit the centralization of power in the hands of government officials. According to pluralist theories of modern democracy, government policies in a democracy are influenced by the continual processes of bargaining among numerous groups representing different interests—business organizations, trade unions, ethnic groups, environmental organizations, religious groups, and so forth. In his classic study of political power in New Haven, Connecticut, Robert Dahl asked the question “Who governs?” (the title of his book). His answer: Competing interest groups or factions are vital to democracy because they divide up power, reducing the exclusive influence of any one group or class (Dahl, 1961; see also Truman, 1981). A democratic political order involves a balance among competing interests, all having some effect on policy but none dominating the mechanisms of government. Elections are also influenced by this situation; to achieve a majority of votes, the parties must be responsive to diverse interest groups. In the view of pluralist theorists, the United States is one of the most pluralistic of industrialized societies and, therefore, one of the most democratic. Competition among diverse interest groups occurs not only at the national level but also within the states and in local communities, as Dahl’s original research showed.

# Power Elite Theories

Not all interest groups necessarily have equal influence or power. C. Wright Mills's celebrated work *The Power Elite* (1956) takes a view different from that of pluralist theories. According to Mills, early in its history, American society did show flexibility and diversity at all levels; however, this has since changed. Mills argued that during the twentieth century a process of institutional centralization occurred in the political order, the economy, and the military. On the political side, individual state governments used to be very powerful and were loosely coordinated by the federal government. But by the mid-twentieth century, Mills argued, political power had become tightly coordinated at the federal level. Similarly, the economy once comprised many small units, businesses, banks, and farms, but now was dominated by a cluster of very large corporations. Finally, since World War II, the military, once restricted in size, had grown to a giant establishment at the heart of the country's institutions.

Not only had each sphere become more centralized, according to Mills, but all had increasingly merged into a unified system of power. Those holding the highest positions in all three institutional areas had similar social backgrounds, enjoyed parallel interests, and often knew one another personally. They had become a power elite that ran the country and, given the international position of the United States, influenced much of the rest of the world. Today, this elite group is sometimes called the "deep state"—entrenched government officials and bureaucrats, often linked to global business interests, who are unresponsive to the electorate, even in liberal democracies. Widespread dissatisfaction with governments considered unresponsive has fueled the rise of antigovernment movements on both the right and left throughout the world, as we will discuss later in this chapter.

According to Mills, the power elite is composed mainly of White Anglo-Saxon Protestants (WASPs) who are from wealthy families, attend the same prestigious universities, belong to the same clubs, and sit on government committees with one another. They have closely connected concerns. Business and political leaders work together, and both have close relationships with the military through weapons contracting and the supply of goods for the armed forces. There is considerable movement among top positions in the three spheres. Politicians have business

interests; business leaders often run for public office; high-ranking military personnel sit on the boards of the large companies.

In opposition to pluralist interpretations, Mills saw three distinct levels of power in the United States. The power elite occupies the highest level, formally and informally making key decisions affecting both domestic and foreign policy. Interest groups operate at the middle levels of power, together with local government agencies. Their influence over major policy decisions is limited. At the bottom is the mass of the population, who have virtually no influence on policy decisions because these are made within closed settings by the power elite. Because the power elite spans the top of both party organizations, the choices open to voters in presidential and congressional elections are so small as to be of little consequence.

Since Mills published his study, other researchers have analyzed the social background and interconnections of leading figures in American society. These studies build on, and expand, Mills's original research. The most detailed research, conducted and updated many times over the past half century, has been done by sociologist G. William Domhoff (1971, 1979, 1983, 1998, 2013, 2022). In his most recent book, he argues that the United States has a corporate-led upper class that includes "Wall Street banks and stockbrokers, military contractors, accounting firms, and corporate law firms, as well as large and well-known corporations, such as Ford Motors, General Electric, IBM, and five large companies that grew very quickly in the past two or three decades: Amazon, Apple, Facebook, Google, and Microsoft" (Domhoff, 2022). In any society, according to Domhoff, there are four major power networks vying to become ascendant: economic, political, military, and ideological/religious. To determine which one dominates, it is necessary to ask three questions: Who governs, who benefits, and who wins? Through detailed statistical analysis Domhoff concludes that power in the United States is concentrated in a small elite that enjoys a vastly disproportionate share of wealth (see also Chapter 8). The power elite exerts power directly, as well as indirectly, through well-funded interest groups, foundations, think tanks, and policy-discussion/planning groups that shape public policy in a pro-corporate direction. While the members of the upper class don't necessarily know one another personally, they are nonetheless interconnected by sharing a common culture that includes

> a common school experience, a summer at the same resort, membership in the same social club, or shared membership on the board of directors of a for-profit or nonprofit organization. The upper class at any given historical moment consists of a complex network of overlapping social circles linked by the members they have in common and by the numerous bonds of trust created by common cultural styles and values, which emerge from a similar upbringing, education, and lifestyle. (Domhoff, 2022)

Although the upper class constitutes a socially cohesive and well-defined community, it is not uniform. Within the upper class, corporate interests exert disproportionate power. And there are different views on social policy as well, with some members of the upper class favoring more liberal social and even economic approaches. Nor is the upper class's power absolute: Public opinion counts—especially during elections—and small gains are always possible for groups with less power. Under the right historical circumstances, even significant gains can be made if there are strong social movements: Examples include labor rights during the Depression of the 1930s and civil rights during the 1960s. Although members of the power elite resist any changes that they feel will adversely affect their interests, change is nonetheless possible: Globalization, technology, terrorism, pandemics, and climate change all create challenges to the existing economic system. How these will play out cannot be predicted.

**Table 13.1 APPLYING SOCIOLOGY TO GOVERNMENT, POLITICAL POWER, AND SOCIAL MOVEMENTS**

| CONCEPT | APPROACH TO UNDERSTANDING GOVERNMENT, POLITICAL POWER, AND SOCIAL MOVEMENTS | CONTEMPORARY APPLICATION |
|---|---|---|

| CONCEPT | APPROACH TO UNDERSTANDING GOVERNMENT, POLITICAL POWER, AND SOCIAL MOVEMENTS | CONTEMPORARY APPLICATION |
|---|---|---|
| **Democratic elitism** | In societies with large populations, direct democracy (in which everybody participates in making policy) is not possible. What is possible is government by elected representatives, although such representative democracy may be weakened when political parties emerge that establish elite control over public policies. | In the United States, two political parties (Democrat and Republican) dominate politics. The degree to which either represents the interest of the majority is often debated, and voter turnout tends to be lower than in other industrialized countries. |

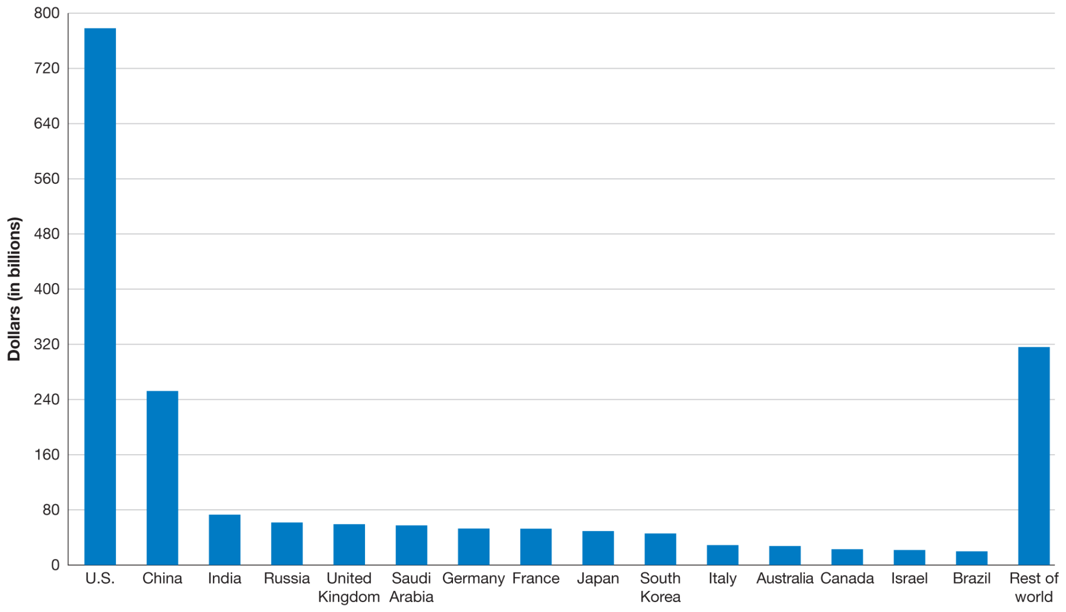
| CONCEPT | APPROACH TO UNDERSTANDING GOVERNMENT, POLITICAL POWER, AND SOCIAL MOVEMENTS | CONTEMPORARY APPLICATION |
|---|---|---|
| **Pluralist theories** | Although direct democracy may not be possible in large-scale societies, it can be achieved nonetheless, since interest groups emerge that represent competing interests in society, such that each group ultimately has a voice that is heard. Examples of such competing interests are business organizations, trade unions, ethnic groups, environmental organizations, and religious groups. | During the latter part of the twentieth century, big unions (such as the United Automobile Workers) were seen as countervailing powers against the economic might of companies like General Motors (then the world's largest corporation). Unions have declined in membership and power over the past half century, however. |

| CONCEPT | APPROACH TO UNDERSTANDING GOVERNMENT, POLITICAL POWER, AND SOCIAL MOVEMENTS | CONTEMPORARY APPLICATION |
|---|---|---|
| **The power elite** | Democracy is thwarted by small groups of rich and powerful individuals whose interests ultimately shape government policy. | General Dwight David Eisenhower, U.S. president (1953–1961) and supreme commander of the Allied forces in Europe during World War II, warned during his farewell presidential address that “we must guard against the acquisition of unwarranted influence, whether sought or unsought, by the military-industrial complex. The potential for the disastrous rise of misplaced power exists and will persist.” |

Some theorists even go so far as to argue that a transnational capitalist class has emerged that increasingly supersedes national power elites. The transnational capitalist class—global jet-setters who run transnational corporations—is absorbing national power elites as it increasingly exerts control over the world economy (Robinson, 2004, 2014; Sklair, 2000, 2002a, 2002b, 2003). We take up these issues more fully in Chapters 9 and 20.

Figure 13.1

**WORLD’S 15 LARGEST MILITARY BUDGETS, 2020**




Source: SIPRI, 2021.

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# The Role of the Military

Mills's argument that the military plays a central role in the power elite was buttressed by a well-known warning from a former military hero and U.S. president, Dwight David Eisenhower. In his farewell address in 1961, Eisenhower warned, "In the councils of government, we must guard against the acquisition of unwarranted influence, whether sought or unsought, by the military-industrial complex. The potential for the disastrous rise of misplaced power exists and will persist" (Eisenhower, 1961). Eisenhower's experience lent considerable credence to his assertion: He served for eight years as U.S. president (1953–1961), held the top rank of five-star army general, and had been supreme commander of the Allied forces in Europe during World War II.

In 1989, at the end of the Cold War, U.S. military spending—which had reached $322 billion in that year—began to decline slightly. With the collapse of the Soviet Union in 1991, the United States became the world's unrivaled military superpower; there was even talk of a "peace dividend" to spend on improving schools, repairing highways, or other domestic needs. But the decline proved to be short-lived. The global war on terrorism triggered another cycle of military spending, reaching a high of $753 billion in 2011. U.S. military spending declined to $634 billion in

2017, before increasing to $778 billion in 2020 (Stockholm International Peace Research Institute [SIPRI], 2021). It is estimated that as of 2020 the United States had spent $5.4 trillion on the war on terror, and had over $1 trillion in obligations to veterans through 2059 (Crawford, 2019). Total military spending in the United States today accounts for two-fifths of the world's entire military expenditures (see Figure 13.1). Part of this expenditure goes to maintaining some 750 military bases in more than 80 different countries and territories. While such a global military presence is justified in terms of national security, it is also intended to support U.S. economic and political interests, and—as seen in the "never-ending wars" in Afghanistan and the Middle East—runs the risk of involving the United States in overseas conflicts (Deppen, 2021; Vine, 2015). While the need for such engagement is now questioned in Washington, the "pivot to Asia," in response to a rising China, suggests that U.S. military presence abroad may not soon diminish. Eisenhower's dire warning about the military-industrial complex seems no less true today than when he uttered it more than 60 years ago.

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**CONCEPT CHECKS**

1. **According to Weber, what are the necessary conditions for democratic systems to be effective?**
2. **Compare and contrast pluralist theories of modern democracy and the power elite model.**

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# Glossary

democratic elitism
: A theory of the limits of democracy. It holds that in large-scale societies democratic participation is necessarily limited to the regular election of political leaders.

pluralist theories of modern democracy
: Theories that emphasize the role of diverse and potentially competing interest groups, none of which dominate the political process.

power elite

Small networks of individuals who, according to C. Wright Mills, hold concentrated power in modern societies.

# 3 RECENT RESEARCH ON U.S. POLITICS AND SOCIAL MOVEMENTS

**Learn about some of the trends associated with modern-day democracy. Assess the effect of globalization and technology on social movements today. Learn about nationalism and the importance of nationalist movements.**

In this section we first look at how different ways of holding elections can shape politics, before turning to political parties, and increasingly polarized party preferences, in the United States. We discuss the role of interest groups and money in politics, and the rise of populist movements that regard government as controlled by insiders (what is often termed the "deep state") and therefore unresponsive to popular interests. We conclude with a discussion of social movements and their important role in fostering change from outside electoral politics.

## Democracy in the United States

The United States is a representative democracy in which political participation is achieved through elected representatives. Political parties have come to play a key role in elections, while interest groups have significant (and, some would argue, growing) influence behind the scenes and on electoral politics.

### Elections and Party Systems

Most countries that hold democratic elections choose their leaders through a system of proportional representation, under which seats in a representative assembly (similar to the U.S. House of Representatives) are allocated according to the proportions of the vote attained by each party. The leader of the party that wins the most seats then becomes the leader of the government (often termed prime minister). Proportional representation usually leads to a multiparty system, since many parties are able to

compete for seats; any party that outperforms the others has a chance to head the government, assuming it wins a majority of the vote. Typically, however, no single party wins a majority. In that case, some of the parties have to form a coalition, an alliance with one another, to form a government. As a result, multiparty systems allow more direct expression of divergent interests, providing an opportunity for the representation of radical alternatives. Green Party representatives and representatives of far-right or far-left parties, found in some European parliaments, are cases in point. Government by coalition is not always successful: It may lead to a stalemate (if compromises can't be made) or to a rapid succession of elections and new governments, none remaining in power for long. The rise of populist authoritarianism in Europe—largely in reaction to unfavorable economic conditions and the influx of millions of refugees from war-torn countries in the Middle East and North Africa—has resulted in the resurgence of right-wing nationalist parties in Hungary, Italy, France, Switzerland, the Netherlands, Austria, Germany, and even liberal Sweden, although recent polling suggests that the appeal of populism in Europe may have declined somewhat in the last several years (Henley, 2021).

The United States differs in that it has a winner-take-all direct election of the president: The candidate who gains the most votes usually wins the election, whether they win by 1 vote or 1 million votes. This system is reinforced by the Electoral College, a unique feature of the U.S. presidential election that dates back to the U.S. Constitution (Article II, Section 1). The Electoral College gives each state electoral votes equal to its congressional representation: The number of representatives (which reflects its population) plus the number of senators (two additional votes). When you vote for a presidential candidate in early November, you are actually voting for the slate of electors from your candidate's party. The electors for that party then cast their votes for the president in December; their votes are then counted in a joint session of Congress in early January. Whichever candidate gets the largest number of votes in a state gets all the state's electoral votes.

The Electoral College was adopted in part because the founders were wary of having the president elected by popular vote, which they feared could result in uninformed masses being manipulated into electing a despot. As Alexander Hamilton (1788) wrote in *Federalist Paper* 68, the election should be made "by men most capable of analyzing the qualities adapted to the station [of the presidency]." Hamilton's distrust of the popular vote reflects another reason the Electoral College was adopted at the founding:

It gave some additional presidential voting weight to less populous rural states by including the two additional electoral votes that reflect each state's two senators.

The Electoral College is a major reason that the many third-party challengers throughout U.S. history have never succeeded in winning the presidency. One of the strongest challenges occurred during the 1992 election, when oil billionaire Ross Perot ran a populist campaign ("stop sending jobs overseas") against incumbent president George H. W. Bush and Democratic challenger Bill Clinton. Perot garnered nearly 20 million votes (19 percent of the total) but failed to win a single state—which meant that despite his fairly strong showing, he won no electoral votes.

Another interesting feature of the Electoral College system is that it sometimes enables a candidate who loses the popular vote to be elected president by the Electoral College. This has happened three times in American history: in 1888, when Grover Cleveland outpolled Benjamin Harrison by about 91,000 votes, but lost the Electoral College vote 233 to 168; in 2000, when Al Gore outpolled George W. Bush by about 500,000 votes, but lost the Electoral College vote 271 to 267; and in 2016, when Hillary Clinton outpolled Donald Trump by 2.9 million votes, but lost the Electoral College vote 306 to 232. Clinton's loss is illustrative of how the Electoral College can swing the election to a candidate who trails substantially in the popular vote. Clinton won large margins of victory in populous states such as California (where she outpolled Trump by 4.3 million votes) and New York (1.7 million votes). Yet her loss by small margins, totaling fewer than 78,000 votes in only three "swing states" (Michigan, where she lost by 10,704 votes; Pennsylvania, 44,292 votes; and Wisconsin, 22,748), cost Clinton 46 electoral votes. Had Clinton won those three states, even by small margins, those 46 electoral votes would have gone to her instead of Trump; Clinton would have been elected president with an Electoral College vote of 278 to 260. It has long been debated whether the country is best served by having such a vote-deciding buffer between the popular vote and the outcome of presidential elections (England & Pearson, 2020; West, 2020; Schmidt, 2002).

## Political Parties and Party Preferences

A political party is an organization of individuals with broadly similar political aims, oriented toward achieving legitimate control of government through an electoral process. The founders of the American governmental

system did not foresee a role for parties in the political order. George Washington recognized that interest groups would develop, but he warned against “the harmful effects of the spirit of party.” Thomas Jefferson echoed these sentiments, but he in fact became the leader of one of the earliest party organizations. The early parties endorsed candidates for Congress, and the subsequent national division of parties spread to the state legislatures. Soon the parties developed into state organizations representing specific interests and points of view.

Because of its winner-take-all Electoral College system, the United States has only two significant political parties, Republicans and Democrats, since, as noted, it is virtually impossible for minor parties to garner sufficient electoral votes to win presidential elections. The two-party system was well established by the 1830s, and its fundamental nature has not altered greatly to this day. Building mass support for a party in the United States is difficult because the country is so large and includes so many regional, cultural, and ethnic groups. Both parties have cultivated electoral strength by forging broad regional bases of support and campaigning for very general political ideals.

U.S. politics is dominated by two major parties. In the 2016 election, younger voters and Black and Hispanic voters overwhelmingly favored Clinton while Trump drew older voters as well as voters from small towns and rural areas.

The U.S. two-party system historically often led to a concentration on the middle ground, where most votes are found, although in recent years the two parties have become increasingly polarized, reflecting (and contributing to) polarization in the country as a whole. Party polarization is exacerbated by primary elections, which are used by parties to determine which candidates they will run for office in the general election. Turnout in primaries favors the party faithful—the party's so-called base, composed of highly committed party members and supporters who are passionate about their political beliefs. While the Democratic Party remains divided between its left-liberal, centrist, and more conservative members (the so-called Blue Dog Democrats), the Republican Party has become much more unified, thanks to years of effective organizing on the part of its socially and economically conservative base.

The Democratic Party historically has tended to appeal more to lower-income groups, while the Republican Party has drawn support from the more affluent sectors. These connections are not absolute, however, and have fluctuated in recent years. In 2016, 53 percent of those earning less than $50,000 voted for the Democratic candidate (Clinton), while 41 percent voted for the Republican candidate (Trump); four years later, the figures were 55 percent (Biden) and 44 percent (Trump), a slight increase for the Republican candidate (Roper Center, 2016, 2020).

The largest differences in voting preferences, however, have mainly to do with age, race, sex, education, an urban-suburban-rural divide, and religion. In the 2020 election, younger voters (under 30) overwhelmingly favored Biden over Trump (60 percent to 36 percent). For voters over 65, on the other hand, Trump was favored over Biden (52 percent to 45 percent). Only 41 percent of all White voters favored Biden, compared with 87 percent of Black voters and 65 percent of Latino voters. Men favored Trump over Biden (53 percent to 45 percent), while the reverse was true for women (57 percent for Biden, 42 percent for Trump). This difference, however, was almost entirely due to the overwhelming preference of Black women voters for Biden (95 percent), who got only 46 percent of White women's vote. More highly educated voters strongly favored Biden: Among those with postgraduate degrees, two-thirds voted for Biden; among those with college degrees, he won 54 percent of the vote. Less educated voters, on the other hand, favored Trump, who won 56 percent of the vote from those with only high school or less formal education. Nearly two-thirds of voters from small towns and rural areas voted for Trump, while two-thirds of metropolitan-area voters and 54 percent of suburban voters preferred Biden. Finally, while Catholic voters were fairly evenly divided between Biden and Trump, Protestant voters strongly favored Trump (59 percent)—a difference that was almost entirely due to White evangelicals, 84 percent of whom voted for Trump. White Evangelicals accounted for nearly a third of the Republican vote in the last three elections (Roper Center, 2020; Igielnik et al., 2021).

As measured by levels of membership, party identification, and voting support, both the Democratic and Republican parties are in decline. Two decades ago, roughly equal proportions of registered voters identified as Democrats (34 percent) and Republicans (33 percent), with significantly fewer identifying as independents (26 percent). As of October 2021, self-identified Democrats and Republicans each claimed only 26 percent, while fully 41 percent claimed to be independents (Jones, 2022a). The decline in party identification reflects a steadily growing distrust of politics among American voters in general. In 1961, roughly three out of every four Americans reported they "trusted the federal government to do the right thing almost always or most of the time." That number has declined ever since, with short upturns around the time of the first Gulf War in early 1991 (under G. H. W. Bush) and again at the time of the 9/11 terror attacks (under G. W. Bush). As of April 2021, the number reporting a trust in government had dropped to fewer than one out of every four Americans (Pew Research Center, 2022a). The reasons for this decline are many:

They include presidential impeachments (Nixon and Trump); economic shocks (inflation under Carter, recession followed by slow recovery under G. W. Bush and Obama); the loss of jobs in industrial areas as a result of globalization; political polarization and decline of bipartisanship in Congress; and, most recently, the Covid-19 global pandemic, whose health effects and economic costs, along with government-mandated vaccination and masking requirements, furthered mistrust in government along party lines.

# Political Participation in the United States

Political participation can take many forms. Highly engaged citizens can run for school boards or governmental office, volunteer to be on civic commissions, or become active in the political party of their choice. At election time, people often volunteer to work on political campaigns, whether it be walking door-to-door to convince voters that their candidate is the best possible choice or helping to get out the vote on election day. But for most Americans, political participation simply means voting.

The 2020 election saw the highest turnout in more than a century: Two-thirds of all eligible voters cast a ballot for president. Yet over the past 50 years, turnout in U.S. presidential elections has typically been 50 to 55 percent. In midterm (nonpresidential) elections, when the entire House of Representatives and a third of the Senate are up for reelection, turnout is often a third lower, around 40 percent (DeSilver, 2021, 2022). The few exceptions to low turnout have been in recent elections, in which a polarized electorate was highly motivated to vote. Obama, the first Black president, caught the imagination of many voters, especially young voters; his two elections (2008 and 2012) resulted in a historically high 60 percent turnout. Trump's 2016 election against Hillary Clinton and his 2020 campaign against Joe Biden provided voters with what many saw as a sharp alternative, which also mobilized voters. The 2018 midterm election saw a 50 percent turnout, a century-old high for turnout in a midterm election, largely mobilizing registered Democrats and some independents who were concerned about the Trump presidency and sought a congressional counterweight (Democrats gained 41 seats in the House of Representatives). Turnout for the 2022 midterm election was somewhat lower (46 percent), but still higher than for previous midterms—and was historically high in such battleground states as Pennsylvania (54 percent), Wisconsin (60 percent), and Michigan (59 percent) (Perry et al., 2022).

Midterms typically see the party out of power sweep the election; pundits and pollsters all predicted a Republican "red wave." As with the previous midterm, however, this election was highly polarized, again motivating Democrats and some independents to turn out and vote. Democrats picked up one Senate seat (Pennsylvania) and lost only nine seats in the House, giving Republicans only a slim majority in that chamber (NBC News, 2022). The youth vote (ages 18–29), 63 percent of which went to Democratic candidates, proved to be critical, especially in battleground states (Center for Information & Research on Civic Learning and Engagement, 2022).

We return to the issue of low voter participation in the United States, and what might be done about it, in the "Unanswered Questions" section at the end of this chapter.

# The Political Participation of Women

The early women's movements saw the vote as both the symbol of political freedom and the means of achieving greater economic and social equality. In the United States, women did not get the right to vote until 1920; in France, not until 1944. Even today, in many countries, women do not have the same voting rights as men.

Women's acquisition of the vote has not greatly altered the nature of politics, although it has had somewhat of an electoral impact. Women's votes contributed significantly to Obama's victory in 2008 and 2012 and Biden's victory in 2020, although women's strong support for Hillary Clinton (54 percent) over Trump (42 percent) in 2016—the first U.S. election in which a major-party presidential candidate was female—did not alter the outcome of that election. Importantly, women such as Vice President Kamala Harris, House Speaker Nancy Pelosi, and Treasury Secretary Janet Yellen have played central roles in American politics. Still, women remain underrepresented in government. In 2023, there were only 25 women in the Senate (out of 100 members) and only 125 in the House of Representatives (29 percent) (Center for American Women and Politics, 2023b). While these percentages might seem low, from a historical perspective, they represent a sea change in women's roles in politics. Just 40 years ago, in 1970, there was only a single woman in the Senate and just 10 in the House.

Since 1990, female candidates have been successful when they have run for office. The critical factor seems to be that political parties (which are run largely by men) have not recruited as many women as men to run for office. The same factors that impede women's advancement in the economy also operate in the realm of politics: institutional barriers that make it difficult for women to rise to prominence, cultural beliefs that undervalue women's leadership abilities, and—when women are expected to shoulder major domestic burdens—lack of time to rise within organizations. That is perhaps why women are more likely to run for local elected positions, such as city council or mayor, rather than for statewide or national offices, which would require them to relocate far from their families. Still, recent elections have seen the rise of many high-profile women in both political parties.

While women such as Massachusetts senator Elizabeth Warren have made inroads, women still remain underrepresented in government, especially in statewide and national offices.

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The influence of women on U.S. politics cannot be assessed solely through voting patterns and elected officials. Feminist groups have influenced political life independently of the franchise, particularly in recent decades. Since the early 1960s, the National Organization for Women (NOW) and other women's groups in the United States have been instrumental in the passing of equal opportunity acts and in getting a range of issues directly

affecting women on the political agenda. Such issues include equal rights at work, changes in family and divorce laws, and lesbian rights. The availability of abortion has long been a key issue for feminist activists, who achieved a legal victory in 1973 when the Supreme Court ruled in *Roe v. Wade* that women had a legal right to abortion. The 1989 Supreme Court ruling in *Webster v. Reproductive Health Services*, which placed restrictions on that right, caused a resurgence of involvement in the women's movement. Yet while the struggle for abortion rights has been led by liberal feminists, conservative women activists have also emerged as leaders to curtail or eliminate abortion rights: March for Life president Jeanne Mancini says her organization's mission is "to work for a time when abortion is unthinkable" (Scanlon, 2021). In June 2022, in a long-awaited decision, the Supreme Court overturned *Roe v. Wade* with a 6–3 vote. In *Dobbs v. Jackson Women's Health Organization*, the court's conservative majority argued that "the Constitution does not confer a right to abortion," which instead should be left to the states (Totenberg & McCammon, 2022). Opposition to the Court's decision was one of the factors that led women's organizations to mobilize voter turnout in the 2022 midterm elections.

Although women in the United States may have achieved increased political power in recent decades, in terms of global comparisons, the country still has a long way to go. The Inter-Parliamentary Union (IPU) compiles a ranking of 193 countries, based on the percentage of women in each country's lower legislative house (comparable with the U.S. House of Representatives). As of October 2021, the United States ranked 72nd, with 27 percent of combined House and Senate seats occupied by women. Rwanda—an African country where intertribal genocide claimed more than 800,000 lives in 1994—ranked first, with 56 percent of all seats held by women (IPU, 2021). In 1960, there was only one democratically elected female head of state, a category that includes presidents, prime ministers, and chancellors: Sri Lankan (then called Ceylon) prime minister Sirimavo Bandaranaike. As of March 2021, there were 22 (out of 193 countries), which shows limited progress (Vogelstein & Bro, 2021). All told, since 1960 more than 60 women have served as heads of state (Statista, 2023b). The country that has had the longest period of female leadership is Bangladesh, a predominantly Muslim country with 165 million people. For more than half of the 50 years since its founding—and for all but 4 years since it became a democracy in 1990—Bangladesh has had two female prime ministers: Khaleda Zia (1991–1996, 2001–2006) and Sheikh Hasina Wazed (1996–2001, 2009–present). Other predominantly Muslim nations

that have had a female head of state include Pakistan, Turkey, Indonesia, Senegal, Kosovo, and Kyrgyzstan (Bennett, 2021).

# Interest Groups, Money, and Politics

An interest group is any organization that attempts to persuade elected officials to consider its aims when deciding on legislation. Lobbying is the act of persuading influential officials to vote in favor of a cause or otherwise lend support to the aims of an interest group. There are countless interest groups that lobby for their desired laws and policies, ranging from tiny organizations with little power (such as Big Cat Rescue) to large organizations that exert considerable influence (such as the National Rifle Association). Interest groups advocate for every imaginable cause: animal rights (People for the Ethical Treatment of Animals, Humane Society); professionals (American Medical Association, American Federation of Teachers); workers (United Farm Workers, United Automobile Workers); liberal causes (People for the American Way, Progressive Democrats of America); conservative causes (Senate Conservatives Fund, Americans for Prosperity); businesses (National Retail Federation, U.S. Chamber of Commerce); and even the entire planet (EarthRights International, Sierra Club).

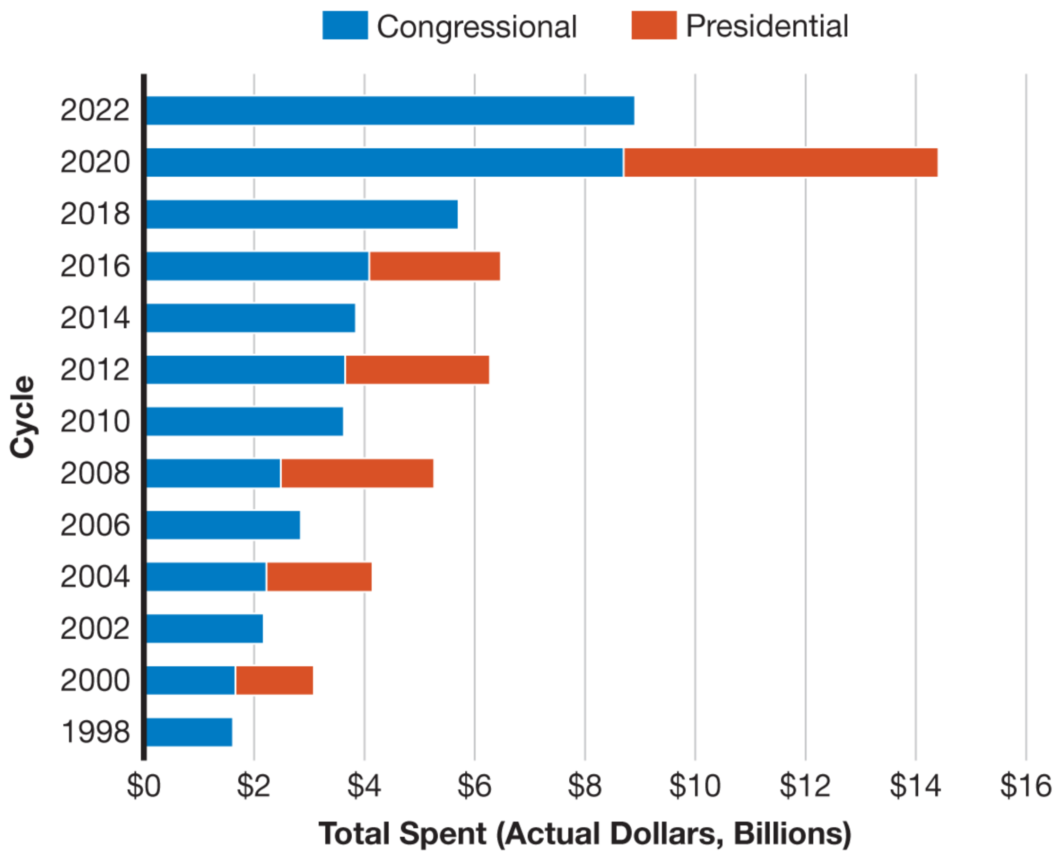
The National Rifle Association, an interest group that advocates for gun rights, holds an annual meeting for members.

The most powerful interest groups represent the interests of businesses, and their lobbying influence (as well as campaign contributions) can be substantial. The U.S. Lobbying Disclosure Act of 1995 requires all interest groups employing lobbyists to register with Congress and to disclose whom they represent, whom they lobby, what they are lobbying for, and how much they are paid. In 2020, more than 11,500 registered active lobbyists spent a combined total of $3.5 billion in efforts to shape legislation (OpenSecrets, 2021). One study looked at how interest groups exert political influence to shape the outcome of U.S. government policy issues (Gilens & Page, 2014). The study, which examined nearly 1,800 different issues, concluded that economic elites and business interests had substantial impact, while average citizens and mass-based interest groups had little or no influence. A more recent study based on the same data concluded that "final policy results follow the opinions of the affluent over those of the middle class" (Grossmann et al., 2021).

The cost of elections has increased significantly in the last few decades (see Figure 13.2). Interest groups therefore also play a key role in elections, since to run as a political candidate is enormously expensive. National officeholders spend a great deal of their time raising money, and interest groups provide much of the funding at all levels of political office. Members of the House of Representatives are up for election every two years, which means that fundraising for the next campaign cycle often begins immediately after the last election. The 2020 election was the most expensive in U.S. history: $14.4 billion was spent on the presidential and congressional races, twice the previous record (set only four years earlier). Although wealthy individuals, businesses, labor unions, and other organizations made up half the total amount, small individual donations accounted for 23 percent—a significant increase from the previous election (15 percent) (Evers-Hillstrom, 2021). Ordinary citizens thus played a larger than usual role in the election, thanks to online funding efforts, the increased role of social media, and a degree of political polarization that motivated people on both sides of the political spectrum to dig into their pockets and often volunteer their time and energy.

Figure 13.2

**TOTAL SPENT ON CONGRESSIONAL AND PRESIDENTIAL RACES**




Source: OpenSecrets, 2022c.

Incumbents have an enormous advantage in soliciting money. In the 2020 House and Senate elections, incumbents raised five and a half times as much money as their challengers—one of the reasons that incumbents were reelected 84 percent of the time in Senate races and 96 percent of the time in House races (OpenSecrets, 2020). Incumbents are preferred as fundraisers partly because they are in a position to ensure favorable votes and obtain spending on their contributors' pet projects and other "pork" for their districts. Incumbency also provides familiarity—a formidable (and costly) obstacle for most challengers to overcome.

In 2010, the U.S. Supreme Court, in a narrow 5–4 decision (*Citizens United v. Federal Election Commission*), overturned a 63-year-old law that limited corporate and union spending in elections. The conservative majority on the court reasoned that corporations and unions were protected under First Amendment free-speech rights, and so were free to spend as much as they chose to express their independent opinions on candidates—so long as these were not coordinated with candidates' campaigns (Liptak, 2010). This decision has raised concern among liberals that businesses are

now able to saturate the airwaves with political ads during elections, thereby exerting undue influence on voters and further tipping the balance of political influence toward those corporations that have deep pockets. Instead of "one person, one vote," it is now "one dollar, one vote," with those having the most dollars able to garner the largest number of votes (Johnson, 2010).

Corporations, which have a strong stake in getting favorable legislation and government contracts, are in fact the largest contributors to campaigns. In the 2019–2020 election cycle, businesses outspent organized labor 24 to 1. Donations from businesses totaled $6 billion; donations from organized labor reached only $244 million (OpenSecrets, 2022b). While these numbers may be somewhat overstated, it is clear that corporations have more financial influence in elections than labor unions (OpenSecrets, 2022b).

Two other sources of funding played a role in the 2020 elections: So-called ideological interest groups (mainly single-issue organizations such as the National Rifle Association, the Environmental Defense Action Fund, the Sierra Club, and National Right to Life) donated $1.4 billion, with 70 percent going to Democrats. A large category of "other" donors (including educators, government employees, nonprofits, religious groups, and retired individuals) accounted for $2.1 billion, split equally between Democrats and Republicans (OpenSecrets, 2022a).

# Populism in the United States

Distrust in government often fuels a rise in populism. In the United States such mistrust achieved modern form with the rise of the Tea Party, a conservative movement strongly identified with the Republican Party that first appeared on the scene in 2009. The Tea Party was not actually a political party; its name came from the Boston Tea Party protests of 1773, in which the colonists dumped tea into Boston Harbor, protesting British taxes on tea exported to the colonies. The Tea Party emerged as a well-organized social movement opposed to what its adherents viewed as the Obama administration's excessive interference in the economy, as seen in its efforts to end the recession through federal spending, its partial takeover of failing corporations, and its push for universal health care coverage.

In the 2016 and 2020 elections, populism achieved a more militant form as a loose organization of more extremist far-right groups and individuals termed the “alt-right” (short for “alternative right”). These groups reject mainstream conservative ideas, embracing instead White supremacy, anti-Semitism, and anti-Islamic beliefs. Some are White power paramilitary groups that advocate armed struggle in hopes of achieving a violent overthrow of the government. Some are well-armed and well-trained militias, made up of battle-hardened veterans from wars in Vietnam and the Middle East, who regard themselves as true patriots and government as illegitimate. Their goal is to “bring the war home,” the title of Kathleen Belew’s (2018) book on the rise of the White power movement.

The rise of these groups suggests that the United States, like many other countries, is experiencing a significant increase in populism in its authoritarian form: the belief that only a strong leader can provide economic security and protect what its adherents regard as an “American” way of life—even if it means rejecting the rule of law and resorting to violence. On January 6, 2021, thousands of supporters of President Trump participated in a violent storming of the U.S. Capitol, in an insurrectionary effort to stop the constitutionally and federally mandated vote tally that would certify Biden as president. Led by populist authoritarian groups such as the Proud Boys, Oath Keepers, and Boogaloos, the riot was encouraged by the outgoing president, who at a noon “Save America” rally falsely claimed that the election was stolen, and urged, “[I]f you don’t fight like hell, you’re not going to have a country anymore” (Rev, 2021). Trump’s role in the riot resulted in his second impeachment by the House (and acquittal by the Senate), both along partisan lines, and reflected deep divisions in American society.

The rise of populism in the United States has been widely studied and much debated. Initial efforts focused on declining support for the Democratic Party among the White workers who had historically been an important base of support. The party’s support for free trade and liberal policies on immigration were part of the problem; many working-class Whites no longer saw the Democratic Party as supportive of their economic interests. Although labor unions had traditionally been a stronghold for Democrats, as union membership declined, so did working-class support (Bartels, 2006, 2008; Frank, 2004, 2005, 2016). There is ample evidence that job insecurity, often reflecting the belief that globalization is responsible, has fueled the rise of populism in the United States (Autor et al., 2020; Ferrara, 2023).

But job loss, growing inequality, and other economic factors do not by themselves account for the rise of populism. Cultural factors also play a central role in a so-called culture war in which Americans who once saw themselves as the dominant culture now feel marginalized by elites who, they believe, look down on their traditional values (Hartman, 2019; Norris & Inglehart, 2019). Feminism, secularism, gender politics, and a reexamination of American history—that emphasizes the central role of slavery and colonial expansion at the expense of the Indigenous population—are seen as threatening their way of life. Sociologist Arlie Russell Hochschild spent five years studying voters in Lake Charles, Louisiana, a Tea Party stronghold that voted heavily for Trump in 2016. Through in-depth interviews, Hochschild sought to understand why Tea Party enthusiasts were so emotionally attached to their hatred of "big government" in Washington. In her landmark study *Strangers in Their Own Land: Anger and Mourning on the American Right* (2016), she concluded that they were angry about what they personally experienced as losing out on their vision of the American dream: They believed that government programs favored racial minorities, immigrants, and—more broadly—a privileged class at their expense. This feeling of a loss of honor proved to be a powerful motivator for right-wing activism.

Economic and cultural factors are both clearly at play in explaining the rise of right-wing populism in the United States. In a detailed analysis that addressed both possible explanations, political economist Dani Rodrik (2021) shows that while economic factors such as globalization may play a key role, one's perception of the economic factors is shaped by culture. Economic shocks caused by trade (such as perceived loss of jobs to overseas production) were more likely to result in Democratic voters (those voting for Obama in 2012) shifting to Republican (Trump in 2016) in majority-White voting districts than in minority-non-White districts. This suggests that the political impact of adverse economic forces is affected by negative attitudes toward immigrants and racial and ethnic minorities. To test this hypothesis, Rafael Di Tella and Rodrik (2020) conducted an online survey in which respondents were shown a (fictitious) newspaper story about a (fictitious) planned factory closure that would risk costing 900 jobs. Different versions of the article identified different reasons for the closure: automation, lowered demand for the product being manufactured, bad management, and outsourcing to a foreign country. Only in the latter case—outsourcing—did survey respondents call for increased protectionism in the form of import restrictions. While this is not surprising, the outsourcing version of the article itself came in two

versions: One identified France as the country that would be getting the jobs, and the other identified Cambodia. Far more respondents favored protectionism when Cambodia was seen as the culprit, rather than France—a difference that was most pronounced among Trump supporters, who tended to be intolerant of cultural differences. Rodrik (2021) concludes that "economics can inflame culture wars . . . by inducing political leaders or parties to adopt campaign strategies deliberately designed to prime latent ethnoreligious sensitivities and divides" (p. 165)—a strategy, he shows, that has been adopted by the Republican Party through its appeal to identity and culture.

Populism, including its more militant form, has found a home in the Republican Party. A 2020 YouGov survey of 1,151 Republicans and Republican-leaning independents found that 51 percent agreed that "the traditional American way of life is disappearing so fast that we may have to use force to save it," while 41 percent agreed that "a time will come when patriotic Americans have to take the law into their own hands." The study also found that the strongest predictor of such antidemocratic sentiments was "ethnic antagonism—especially concerns about the political power and claims on government resources of immigrants, African-Americans, and Latinos" (Bartels, 2020, pp. 22752–22753). The more militant views of the Republican Party were also seen in a survey about Americans' attitudes toward the January 6, 2021, attack on the Capitol. The poll, conducted a year after the attack, found that while 72 percent of respondents believed that those involved in the attack were "threatening democracy," 52 percent of Republicans believed that the rioters were "protecting democracy" (Shepherd, 2022).

# The Role of Social Media

Roughly 7 out of 10 Americans 18 or older said they used social media in 2021; among younger adults (ages 18–29), nearly all reported using YouTube, 71 percent reported using Instagram, and nearly half reported using TikTok (Auxier & Anderson, 2021). While statistics on internet use among children are harder to come by, almost all children over three in the United States have internet access through a home computer or smartphone (National Center for Education Statistics, 2021c), and most school-age children relied on the internet for homeschooling for at least some time during the Covid-19 pandemic. It should come as no surprise that the pervasive use of social media has played a role in politics.

After losing the presidential election in 2020, President Trump used Twitter to drum up support for his "Stop the Steal" campaign to invalidate the results of the election.

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Populism has benefited from the revolution in social media, which has given citizens in every country unparalleled access to information. While this in theory should result in a better-informed citizenry, it has also created significant challenges to democracy. Both as candidate and as president, Trump used Twitter to mobilize his supporters, including falsely claiming the 2020 election had been stolen and urging thousands of protesters to march on the Capitol and "stop the steal." The power of social media to generate misinformation is not limited to elections; it enables all sorts of "fake news" to proliferate (Flintham et al., 2018). QAnon—which claims that a global cabal of cannibalistic, satanic pedophiles control governments, the news media, and Hollywood—may be followed by only a small percentage of Americans, yet it nonetheless has an impact: One poll found that 15 to 20 percent of Americans believe in its core conspiracy theories, and more than 40 candidates for national office in 2022 claimed some degree of support for QAnon (Alba, 2021; Chatelain, 2021; Linvill et al., 2021; Shanahan, 2021). The Covid-19 pandemic has also given rise to widely shared social media misinformation; one survey found that a quarter of all Americans claim they don't know whether or not Covid-19 vaccines secretly implant a microchip in order to track the vaccinated (they don't!) (Ipsos, 2021; Sriskandarajah, 2021). Social media enables fake

news to spread at warp speed, contributing to the creation of "echo chambers" in which our social media network is limited to those sharing similar beliefs, which reverberate and reinforce one another. Being part of a community of believers is nothing new; drawing comfort and certainty from sharing ideas with like-minded people is a foundation of all communities. But today social media radically extends the size and reach of our community, enabling us to ignore unwanted information while being overwhelmed with information that tells us what we want to hear—whether or not it has any basis in reality.

# Political and Social Change Through Social Movements

Political life is by no means carried out only within the framework of political parties, voting, and representation in legislative and governmental bodies. When groups' objectives or ideals cannot be achieved within, or are blocked by this framework, political and social change may require other forms of political action. Social movements, which as we have previously noted operate outside the established political system, have been an important source of social change throughout U.S. history. Examples include social movements for women's and LGBTQ+ (lesbian, gay, bisexual, transgender, and queer) rights and the civil rights of African Americans; antiwar movements; pro–gun control movements, and more. Terrorism can be seen as an extreme form of social movement—one that is willing to use violence, often directed against civilian populations, to achieve its goals.

## Why Do Social Movements Occur?

Social movements develop as a way of mobilizing group resources either when people have no institutionalized means of voicing their concerns or when the state authorities repress their needs. Because mass social movements have been so important around the world throughout history, especially during the past two centuries, many theories try to account for them. In an early study of collective action and social movements, sociologist Neil Smelser (1963) distinguished six stages in the development of collective action and social movements, each stage seen as a necessary precondition for the next in that it "adds value" (Smelser's term) to the overall outcome. These include

- Conducive social conditions, such as the degree to which civil liberties permit or encourage peaceful protests and social movement formation
- Structural strains in society, such as economic downturns or growing inequality, which can result in feelings of relative deprivation
- Generalized beliefs that crystallize grievances and suggest what can be done
- Precipitating events—for example, Rosa Parks's refusal to give her seat on the bus to a White passenger in 1955, which resulted in the Montgomery, Alabama, bus boycott and helped launch the civil rights movement
- Leadership that is effective in obtain funding and other resources, including establishing some means of regular communication among participants
- The degree of social control by governing authorities—whether the state responds by addressing the grievances or by ruthlessly suppressing all forms of protest

In another early study, sociologist Charles Tilly (1978) distinguished several main components of collective action—people acting together in pursuit of shared interests—that are key to successful social movements. For Tilly, key components are effective group organization, which includes the ability to acquire and mobilize necessary resources; the existence of shared interests of those engaging in collective action; and opportunities that exist for social movements to be effective.

Social movement theory over the past half century has built on Smelser's and Tilly's insights, adding to them and modifying them to reflect changing social conditions. We examine four frameworks that have been used to explain the emergence and success (or failure) of social movements: economic deprivation, resource mobilization, messaging and communication, and political opportunity.

**Economic Deprivation** Perhaps the most influential theory of social movements originated more than a century and a half ago, in the writings of Karl Marx (Marx, 1983, 1867/2008; Marx & Engels, 1848/2008; also see Chapter 1). According to Marx, modern capitalism—an economic system based on ruthless competition among firms in pursuit of profit—requires individual firms to cut costs continually in order to remain competitive. Marx argued that this initially occurs by keeping domestic wages low, but he also predicted that it would be achieved by moving

production (and therefore jobs) to low-wage countries, as well as replacing workers with the latest technologies (automation). Both these strategies, while enabling businesses to survive, create a gulf between a rich minority that controls the industrial resources (Marx's "capitalist class") and an increasingly impoverished majority of waged workers (Marx's "proletariat class"). In Marx's view, over time the rich get richer and the poor get poorer—too poor, in fact, to afford the goods they are producing, resulting in economic crises when goods cannot be profitably sold. Widespread poverty, exacerbated by recurrent economic crises, fuels widespread discontent, and if workers can be educated to understand that the economic system is biased against them, they will rise up in revolution, creating a classless society where everyone shares in the fruits of their labor (communism). As Marx saw it, the task of the communist party was to provide this education and lead the revolution—in other words, to create a global social movement.

Deprivation of the peasantry compared to the elite in France led to the overthrow of the monarchy.

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Needless to say, capitalism proved to be more resilient than Marx had predicted: The modern welfare state, enacted throughout Europe and North

America in response to the Great Depression of the 1930s, created a "social safety net" in the form of government-funded retirement programs such as Social Security, unemployment compensation, welfare payments to the poor, and (in Canada and most European countries) universal health care. Economic growth between the end of World War II (1945) and the early 1970s also blunted the appeal of revolutionary social movements in advanced industrial countries. Yet the persistence of economic inequality contributed to the rise of labor movements in Europe and the United States (Chapter 14), and, as previously mentioned, social movements emerged to address issues such as women's, LGBTQ+, and, in the United States, African American rights. Where communist revolutions did occur—most notably in Russia and China—the results were hardly the utopian classless societies that Marx envisioned.

Contrary to Marx's argument that poverty itself would foster revolutionary social movements, some research suggests that social movements are more likely to occur not as a result of absolute deprivation, but rather as a result of relative deprivation—the deprivation a group of people feels when they compare themselves with another group that is better off, or compare their circumstances to those at a previous time when they were better off. This theory was first advanced in sociology nearly three-quarters of a century ago (Davies, 1962; Merton, 1957; Stouffer et al., 1949) and has since received widespread use in social psychology, since it is the *perception* of a discrepancy between what one has and what one should have that is important (Smith et al., 2020; Walker & Pettigrew, 1984; Walker & Smith, 2002). Relative deprivation has even been used to explain the rise of violent extremism throughout the world in the twenty-first century, across many different cultures and in vastly different contexts (Kunst & Obaidi, 2020). As we have already seen, it also provides an explanation for the rise of right-wing populism among Tea Party activists in the United States, who felt that the government has benefited other groups at their expense (Hochschild, 2016).

**Resource Mobilization** Although protests often occur against a backdrop of rising expectations, to understand how they become mass social movements, we need to identify how groups collectively organize to make effective political challenges, including how they obtain the necessary resources to be effective. In the United States today, mass marches, large political rallies, the use of highly confrontational social media, and even riots have become common—but under what conditions do they become social movements? Resource mobilization theory originated in the writings

of John McCarthy and Mayer Zald (1977), who argued that “there is always enough discontent in society to supply grassroots support for a movement if the movement is efficiently organized and has at its disposal the power and resources of some established group” (p. 1215). Necessary resources include not only money but also the operation and management of social media and other information and communication technology, as well as labor (Bromideh, 2011)—sometimes paid, if the organization is financially successful, but most often volunteer. Organizations that are well resourced are also likely to be taken more seriously as legitimate by news media and politicians (Andrews & Caren, 2010).

Money is raised in various ways, usually from individual donations obtained through massive email and social media solicitations, but also from foundations and sometimes even from governmental agencies. This raises a paradoxical situation: The more successful social movement organizations are in mobilizing financial resources, the more likely are they to become beholden to their donors. Large professional organizations have large expenses, often including full-time staff, so they must continually raise large amounts of money in order to function (Saunders, 2013). Since large donors have requirements tied to their support, an organization may find itself becoming less of a militant “outsider” and more of an “insider” that is willing to compromise its original goals. On the one hand, such insider status may provide access to politicians, government commissions, and widespread public visibility, and therefore the ability to influence policy. On the other hand, it may result in “deradicalization and the watering down of demands” (Saunders & Roth, 2019, p. 141). Still, as McAdam and colleagues (1988) have pointed out, if there are outsider organizations making more radical demands on the same issues, this may enable the more moderate demands of the insider to be achieved.

Rosa Parks's refusal to give up her seat to a White man on a bus in 1955 sparked the civil rights movement and is an example of a precipitating event.

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**Messaging and Communication** In order for a social movement to emerge, existing discontent must be captured in a way that resonates with large numbers of people. An analysis of the problem must be coupled with proposed solutions, often presented as a series of demands to be achieved

through mass actions such as protests and demonstrations. The messaging must be motivational, communicated in a way that channels anger into action (Saunders & Roth, 2019). The civil rights movement of the 1960s was energized by the August 1963 March on Washington for Jobs and Freedom, in which more than a quarter million peaceful demonstrators gathered before the Lincoln Memorial to demand that the Kennedy administration initiate civil rights legislation. The march was the outcome of more than a decade of organizing by African American activists in the South and it was key to the passage of the 1964 Civil Rights Act ending segregation in public places and outlawing employment discrimination on the basis of race, color, religion, sex, or national origin. Martin Luther King's famous "I Have a Dream" speech ("when all of God's children, black men and white men, Jews and Gentiles, Protestants and Catholics, will be able to join hands and sing with the Negroes in the spiritual of old: Free at last! Free at last! Thank God Almighty, we are free at last!") has become an inspirational anthem of the civil rights movement ever since (Martin Luther King, Jr., Research and Education Institute, n.d.; Smithsonian, n.d.).

Mass rallies, however, are not necessary to galvanize a social movement. In the age of social media, messaging that resonates with large numbers of people can go viral in hours and even minutes. The 1963 March on Washington for Jobs and Freedom was publicized in a handful of newspapers, on some radio stations, and on television (there were only three major networks at the time), as well as on mimeographed handouts and by word of mouth. Activists today have numerous TV networks to choose from, from left/liberal (MSNBC) to right/conservative (Fox News). They also have countless popular social media sites to choose from, including Twitter, Facebook, Messenger, Instagram, YouTube, TikTok, WeChat, Pinterest, and Reddit. The role of social media in fostering social movements remains an unanswered question we will explore at the end of in chapter.

**Political Opportunity** Finally, for a social movement to occur and have hopes of succeeding, there must be sufficient political space for it to do so. Social movements are most likely to thrive in democratic settings—countries where the right to dissent is both legally enshrined and enforced. Even in repressive states, divisions among the elites may permit social movements to emerge. One study that examined transnational social movements—movements that operate in many countries—found that apart from the opportunities afforded in individual countries, global factors have

also played a role historically. The eugenics movement, which called for coercive sterilization of people deemed to be “unfit” in order to rid society of social ills, was strongest between the two world wars. Emerging international organizations such as the League of Nations provided opportunities for a global discussion of eugenics ideas; conferences proliferated; and cultural values in many countries were supportive. (In the United States, for example, 29 states adopted sterilization policies in the mid-1930s.) After World War II and the Nazi use of eugenics to justify the Holocaust, the ideas fell into universal disfavor (Barrett & Kurzman, 2004).

Globalization has provided an opportunity for social movements to flourish. The last few decades have seen an explosion of social movements around the globe. Many of these movements—ranging from the civil rights and feminist movements of the 1960s and 1970s, respectively, to the antinuclear and ecological movements of the 1980s, to the LGBTQ+ rights campaign of the 1990s and 2000s, to today’s Black Lives Matter and March for Our Lives—are examples of what has been referred to as new social movements. This means that they are often concerned with the quality of private life as much as with purely economic issues, calling for changes in the way people think and act. These movements have been described as “new” because they depart from the purely economic and political concerns of more traditional social movements, such as the right to form labor unions (Laraña et al., 1995; Melucci, 1980, 1994). Instead, they involve lifestyle issues, new collective identities that provide a high degree of solidarity among participants (Saunders, 2008). Participation is viewed as a moral obligation (and even a pleasure), rather than exclusively as a calculated effort to achieve a specific—often economic—goal. Moreover, the forms of protest new social movements choose constitutes an “expressive logic” whereby participants make a statement about who they are: Protest is an end in itself, a way of affirming one’s identity, as well as a means of achieving concrete objectives (Polletta & Jasper, 2001).

This was the case with two recent and prominent examples: the LGBTQ+ rights and Black Lives Matter (BLM) movements. Until recently, many LGBTQ+ persons hid their sexual orientation for fear that “coming out of the closet”—publicly revealing their sexual orientation—would cost them their jobs, families, and friends, and leave them open to verbal and physical abuse. Yet, since the late 1960s, many LGBTQ+ persons have acknowledged their sexual orientation openly. Celebrities—ranging from pop singers Halsey and Adam Lambert to news anchor Anderson Cooper

—are “out” publicly, with little fanfare. Major league sports, long considered a bastion of heterosexism, embraced Jason Collins, who came out as gay before he played his last season for the NBA’s Brooklyn Nets. With his announcement, Collins became the first active player in one of the four major American professional team sports to announce that he was gay (ESPN, 2013). Coming out may be important not only for the person who does so but also for others in the larger society: Previously closeted LGBTQ+ persons discover they are not alone, while straight people recognize that people whom they admire and respect are gay.

Black Lives Matter is a social movement calling for an end to racial profiling, police brutality, and the mass incarceration of Black people.

The current global wave of LGBTQ+ civil rights movements began partly as an outgrowth of the social movements of the 1960s, which emphasized pride in racial and ethnic identity. One pivotal event was the Stonewall riots in June 1969, when New York City’s gay community, angered by continual police harassment and aggression, fought the New York Police Department for two days (Carter, 2004). The Stonewall riots became a symbol of LGBTQ+ pride. In 1994, on the twenty-fifth anniversary of the Stonewall riots, 100,000 people attended the International March on the United Nations to Affirm the Human Rights of Lesbian and Gay People. In May 2005, the International Day Against Homophobia (IDAHO) was first celebrated, with events held in more than 40 countries. In 2019, the fiftieth

anniversary, thousands of people gathered outside the bar to celebrate—just four years after same-sex marriage became legal in all 50 states. Clearly, significant strides have been made, although discrimination and violence remain serious problems for many LGBTQ+ Americans.

Today, there is a growing movement worldwide for the civil rights of gays and lesbians. The International Lesbian, Gay, Bisexual, Trans, and Intersex Association (ILGA, 2023), which was founded in 1978, has more than 1,700 member organizations in 160 countries and territories. It holds international conferences, supports LGBTQ+ social movement organizations, and lobbies international organizations. For example, it persuaded the Council of Europe to require all its member nations to repeal laws banning same-sex relations. Most recently, in 2023 ILGA fought in "unequivocal terms, the passing of the 'Anti-Homosexuality Bill' in Uganda" and in 2022 protested the FIFA World Cup in Qatar because of the country's long-standing oppression of LGBTQ+ persons (Guardian Sport, 2022).

Social movements continue to work for LGBTQ+ persons worldwide, especially in the Global South. As of 2023, same-sex relations are criminalized in 64 nations, mainly in Africa. Taiwan is considered among the most liberal nations in Asia, yet it legalized same-sex marriages only as recently as 2019. In contrast, Europe has some of the most liberal laws in the world. As of 2023, 34 out of 194 countries for which data are available allow same-sex couples to marry. (See Chapter 15 for further information on the legalization of gay marriage.) Social change is occurring, slowly but steadily, although much progress is still necessary.

The Black Lives Matter (BLM) movement was founded in 2013, after George Zimmerman was acquitted in the murder of Trayvon Martin, a 17-year-old whom Zimmerman had decided was "acting suspiciously" while walking home from a convenience store. Zimmerman confronted the unarmed Martin, and in the ensuring altercation shot and killed him. Zimmerman's acquittal sparked widespread outrage, and BLM was founded to protest the large number of African Americans who are killed every year by the police or vigilante groups. It has grown into a decentralized, loosely organized global social movement focused on police brutality and racially motivated violence against Black people. BLM has organized countless protests and rallies following incidents of police violence. When George Floyd was killed by Minneapolis police officer Derek Chauvin, who kneeled on Floyd's neck for nearly 10 minutes as

Floyd gasped for air and pleaded “I can’t breathe,” his death was filmed by horrified bystanders and transmitted in real time to the world. BLM protests drew a half million demonstrators across 550 cities on June 6, 2020. When protests spanning several months are taken into account, as many as 26 million people claim to have participated (Buchanan et al., 2020). BLM protests have also led to a backlash, resulting in slogans (and hashtags) such as “All Lives Matter,” “Blue [police] Lives Matter,” and “White Lives Matter”—the latter chanted by torch-carrying White racists groups at the 2017 Unite the Right rally in Charlottesville, Virginia. While very few BLM demonstrations have been associated with any acts of violence, conservative media have falsely characterized the movement as being both violent and anti-White.

March for Our Lives (MFOL) grew out of the tragic February 14, 2018, shooting at Marjory Stoneman Douglas High School in Parkland, Florida, where a former student—armed with an assault rifle—killed 17 people and wounded 17 others. It is led by young people, including outspoken Marjory Stoneman Douglas shooting survivors X González and David Hogg. One month after the shooting, 3,000 schools and a million students participated in the Enough! National School Walkout. MFOL’s marches on March 25, 2018, were reported to be the largest day of protests against gun violence in U.S. history. The culminating march, in Washington D.C., was estimated to have attracted more than 200,000 participants (CBS News, 2018). While the Marjory Stoneman Douglas school shooting was among the deadliest school shootings in U.S. history, it was neither the first nor the last. Since the 1999 shooting at Colorado’s Columbine High School claimed 13 lives, nearly 400 have been killed and more than 1,100 injured in K–12 shootings. There have been 150 killed and more than 500 injured in school shootings during the four years since the Marjory Stoneman Douglas shooting, and MFOL organized a second Washington march in June 2022. It has also engaged in voter registration drives and takes some of the credit for record youth turnouts in recent elections. Like BLM, MFOL has produced backlash. During the 2018 Washington march, the National Rifle Association (NRA) claimed on its Facebook page that “protests aren’t spontaneous. Gun-hating billionaires and Hollywood elites are manipulating and exploiting children as part of their plan to DESTROY the Second Amendment” (Griggs, 2018).

The rise of new social movements reflects the fact that traditional political institutions are increasingly unable to cope with the challenges before them, such as global warming and climate change, persistent inequality,

and even global pandemics. Because existing democratic political institutions seemingly cannot fix these problems, they are ignored or avoided until a full-blown crisis occurs. As a cumulative effect of these new challenges and risks, people feel less secure and more isolated—a combination that leads to a sense of powerlessness. As faith in traditional politics wanes, the growth of social movements is evidence that citizens are not apathetic or uninterested in politics. Rather, there is a belief that direct action and participation are more useful than reliance on politicians and political systems.

## Nationalist Movements

Some of the most important social movements today are nationalist movements. Although the countries of the world have become more interdependent, especially since the 1970s, this interdependence has not spelled the end of nationalism. It may even have helped intensify it. Recent thinkers have contrasting ideas about why this is so. There are also disagreements about the stage of history at which nationalism, the nation, and the nation-state came into being.

**Nationalism and Modern Society** Different nations have followed divergent patterns of development in relation to ethnic communities. In some, including most of the nations of Western Europe, a single ethnic community expanded and pushed out earlier rivals. Thus, in seventeenth-century France, several other languages were spoken and different ethnic histories were linked to them. As French became the dominant language, most of these rivals disappeared. Yet remnants persist in a few areas. One is in the Basque country overlapping the French and Spanish frontiers. The Basque language is different from either French or Spanish, and the Basques claim a separate cultural history. Some Basques still want their own nation-state.

Forty years ago, in a work that has shaped our understanding of the rise of modern nation-states, Benedict Anderson (1983/2016) argued that modern nation-states were actually (to use his terms) “imagined communities” that were largely the result of the rise of capitalism, abetted by the printing press, which facilitated the widespread dissemination of the notion that the “nation” was composed of people with shared ethnic and cultural identity. National identities, he argued, were socially constructed—a process that began in Western Europe and then spread around the globe. Nations might be socially constructed, he argued, but their adherents do not see them this

way: Nationalism and national identity are experiences sufficiently real that people are often willing to kill (and be killed) for their countries. Nationalism, as we have noted previously in this chapter, is resurgent at this time: Increasing numbers of people across Europe see themselves as British (and sometimes even Scottish or English before British) or French or some other nationality, rather than as European. Anderson's notion of "imagined community" can even apply to groups of individuals without national borders. These include the so-called Islamic State, whose violent efforts to create a homeland in Syria and Iraq have largely been thwarted; online communities of like-minded people, such as Stop the Steal or QAnon; diasporic groups such as Palestinians (Al-Hardan, 2016), Jews (Abramson, 2017), and Kurds (Ross & Mohammadpur, 2018); groups based on sexual identity (Alm & Martinsson, 2017); and even transnational corporations (Buckler, 2016).

**Nations Without States** The persistence of well-defined ethnic communities within established nations contributes to the phenomenon of nations without states—imagined communities, to use Anderson's phrase, that exist in other states but lack a territorial state of their own. Kurds, Palestinians, and Tibetans are current examples of nations that aspire to their own state. This has been a significant source of conflict in the world today.

Several types of nations without states can be recognized, depending on the relationship between the ethnic community and the nation-state in which it exists (Guibernau, 1999):

- In some situations, a nation-state may accept the cultural differences among its minorities and allow them a certain amount of active development. Thus, in Great Britain, Scotland and Wales are recognized as having histories and cultural features partly divergent from the rest of the United Kingdom, and, to some extent, they have their own institutions. The majority of Scots, for instance, are Presbyterians, and Scotland has long had a separate educational system from that of England and Wales. Scotland and Wales achieved further autonomy within the United Kingdom with the creation of a Scottish Parliament and a Welsh Assembly in 1999.
- Some nations without states have a higher degree of autonomy. In Québec (the French-speaking province of Canada) and Flanders (the Dutch-speaking area in northern Belgium), regional political bodies have the power to make major decisions even though they are not

fully independent. They also contain nationalist movements agitating for complete independence.

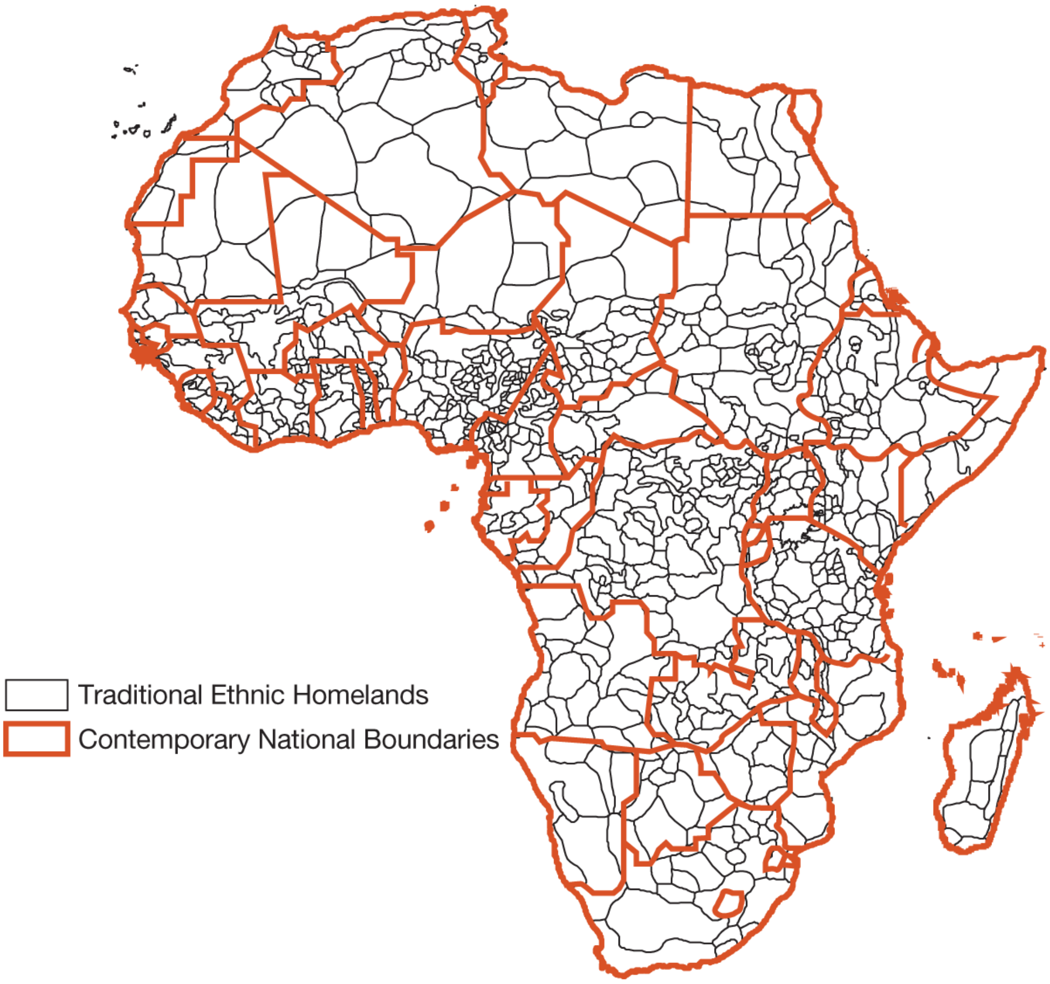
- Some nations completely lack recognition from the state that contains them. In such cases, the larger nation-state uses force to deny recognition to the minority. Palestinians are an example. Others include the Tibetans in China, and the Kurds, whose homeland overlaps parts of Iran, Iraq, Syria, and Turkey.

**States Without Nations** Recall the definition of nation-states: "particular types of states, characteristic of the modern world, in which governments have sovereign power within defined territorial areas, and populations are citizens who know themselves to be part of single nations." What happens when significant sectors of the population come from different ethnic or tribal groups and they do not believe that they are a part of the imagined community that composes the nation-state?

This has proven to be a problem in many African and Middle Eastern countries, often with violent results. The borders of these countries were the result of European colonialism; they were drawn up by the major European powers at the Berlin Conference of 1884–1885. The borders reflected the negotiated interests of Germany, France, Britain, Belgium, Portugal, Spain, and other European countries; they had little or nothing to do with the tribal identities of the people who actually lived there. In many of these countries, boundaries between colonial administrations that were set arbitrarily in Europe ignored economic, cultural, or ethnic divisions among the population being colonized. As a consequence, most colonized areas contained a mosaic of ethnic communities and other groups (**Figure 13.3**).

Figure 13.3

**BOUNDARIES OF HISTORICAL ETHNICITIES BEFORE COLONIZATION AND NATIONAL BOUNDARIES**




Source: Michalopoulos & Papaioannou, 2012.

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Nationalist movements promoting independence in Africa following World War II sought to free the colonized areas from European domination. Once this had been achieved, the new leaders faced enormous problems trying to create national unity. Many of the leaders in the 1950s and 1960s had been educated in Europe or the United States, and there was a vast gulf between them and their citizens, most of whom were illiterate, poor, and unfamiliar with the rights and obligations of democracy. Under colonialism, some ethnic groups had prospered more than others; these groups had different interests and goals, and they legitimately saw each other as enemies. When the former colonies finally achieved independence in the second half of the twentieth century, it was hard to create a sense of nationhood. Although nationalism had played a great part in securing the independence of colonized areas, it was confined to small groups of activists and did not reflect the majority of the population. As a result, many postcolonial states were threatened by internal rivalries and competing claims to political

authority. Civil wars broke out in several postcolonial states in Africa, such as Nigeria, Sudan, and Zaire; ethnic rivalries and antagonisms characterized many others in both Africa and Asia.

To take one example, in Sudan—the third-largest country in Africa—about 40 percent of the population speaks Arabic and claims Arabic ethnic origins. Elsewhere in the country, particularly in the south, Arabic is barely spoken at all. Once the nationalists took power, they set up a program for national integration, with Arabic as the national language. The attempt was only partly successful, and the stresses it produced are still visible. In January 2011, a referendum was held in South Sudan, with nearly 100 percent of those voting supporting independence. South Sudan became an independent country as a result, although conflicts and open fighting between the two countries continue. Civil war erupted in South Sudan two years after the country gained independence, the result of conflict between the country's two largest ethnic groups: the Dinka and Nuer. As of November 2021, the United Nations reported that fully half of South Sudan's 11 million people needed food assistance, 1.5 million were internally displaced, and 2.2 million were refugees in other countries, the result of ongoing civil strife (World Food Programme, 2023). Nor is South Sudan alone: At the end of 2021, an estimated 106 million Africans suffered from food insecurity, including 26 million people in the war-torn Democratic Republic of the Congo, who faced such severe food insecurity that their lives or livelihoods were in immediate danger (Africa Center for Strategic Studies, 2021).

In summary, most states in the developing world underwent different processes of nation formation from those in the industrialized world. States were imposed externally on areas that often had no prior cultural or ethnic unity, leading to problems that are very difficult to overcome. Many of these newly formed countries are examples of what we earlier described as failed states.

# The Nation-State, National Identity, and Globalization

When rapidly increased economic globalization became evident in the 1970s, some scholars predicted the inevitable decline of the nation-state. Japanese business writer Kenichi Ohmae's best seller, *The End of the*

*Nation State: The Rise of Regional Economies* (1995), predicted that the information age would render borders largely irrelevant when it came to economic power. National economies would give way to sub-national, "region states" of 5 million to 20 million people, which would become future "engines of prosperity." Some examples, according to Ohmae, were San Diego/ Tijuana, Singapore/Malaysia/Indonesia, Silicon Valley/Bay Area, and Hong Kong/southern China. In a follow-up book published a few years later, Ohmae (2002) added that "triad power" would emerge in the future: a global economy centered around Japan, Europe, and the United States. Ohmae's ideas found fertile ground, especially in popular writing (see, for example, Guéhenno, 2000; Rosecrance, 1996; for a review, see Modisett, 2002). As the world economy became interlinked through global production networks and information flowed freely across borders, the ability of nation-states to control their internal affairs—including securing the welfare of their citizens—was clearly diminished.

Nation-states may have weakened in the face of globalization, but their predicted demise has proved to be premature. As we have seen, populist social movements in the United States and Europe are demanding not an end to the nation-state, but rather a closing of borders and a strengthening of what they believe to be their national heritages. The European Union (EU), once a shining example of Ohmae's "triad power," unites 27 member countries (19 of which use the euro as their currency) into a single integrated economy. But Britain voted to leave the EU in a 2016 referendum and officially departed four years later. The reasons that Britain's departure (dubbed "Brexit") won a narrow majority of voters largely reflected nationalist and populist feelings: Nearly half of all voters said their biggest reason for wanting to leave was "the principle that decisions about the UK should be taken in the UK"; nearly half also felt that immigration was the most important issue facing Britain (Ashcroft, 2016; Ipsos, 2016). Many who voted for Brexit were concerned that too many immigrants fleeing conflicts in the Middle East and North Africa would find their way into Europe under EU policies. Immigration issues continue to challenge the viability of the EU.

A more accurate way of framing the current situation would be to think of two powerful forces at play today—the international world of nation-states and the transnational forces of globalization that are challenging the nation-state. Nation-states remain important in the world today; they alone have governments and legal structures, along with the means to enforce laws—both internally (through police powers) and externally (through

military means). Nation-states are the recognized actors in international organizations, such as the United Nations and the World Trade Organization; they form economic and military alliances with one another, and all too often wage wars to achieve their objectives.

Yet the economic, political, environmental, and cultural power of nation-states is everywhere being challenged by globalizing forces that show little regard for national borders. Trillions of dollars cross borders with the click of a mouse, while products that are designed in one country give jobs to workers half a world away. Global warming and environmental degradation threaten everyone on the planet, regardless of which country is the immediate source of the problem. YouTube, the internet, and popular culture generally flow freely around the world, despite the efforts of authoritarian regimes to control them.

Whether the outcome of this titanic conflict between nation-states and globalization will ultimately favor one or the other is uncertain—which is one reason globalization has become such a fascinating topic for sociologists and other social scientists to study.

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**CONCEPT CHECKS**

1. **How does the two-party system in the United States affect political involvement?**
2. **Describe the role that interest groups play in American politics.**
3. **What role has technology played in social movements?**
4. **Describe the arguments given for the persistence of the nation-state.**

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# Glossary

interest group
: A group organized to pursue specific interests in the political arena, operating primarily by lobbying the members of legislative bodies.

lobbying
: The act of persuading influential officials to vote in favor of a cause or otherwise lend support to the aims of an interest group.

labor unions

Organizations that advance and protect the interests of workers with respect to working conditions, wages, and benefits.

structural strain

Tension that produces conflicting interests within societies.

collective action

Action undertaken in a relatively spontaneous way by a large number of people assembled together.

relative deprivation

Deprivation one feels by comparing oneself with a group.

new social movements

A set of social movements that have arisen in Western societies since the 1960s in response to the changing risks facing human societies. New social movements differ from earlier social movements in that they focus on a range of human rights as opposed to economic concerns, and thus draw support from across class lines.

nations without states

Instances in which the members of a nation lack political sovereignty over the area they claim as their own.

# 4 UNANSWERED QUESTIONS

**Understand why voter turnout in the United States is low and consider the role that the internet played in the 2020 election. Evaluate whether democracy is in trouble.**

In this final section, we focus on three of the many unanswered questions concerning politics and social movements. They involve challenges faced by democracies in the United States and elsewhere: low voter turnout, the impact of the internet, and the future of democracy.

## Why Is Voter Turnout So Low in the United States?

As we have seen, voter turnout in the United States is historically low. The high 2020 election turnout was not only due to highly motivated voters; it was also partly the result of much greater ease of voting, which saw slightly more than half of all voters cast a mail-in ballot (also often referred to as absentee voting). Four years earlier, only a quarter of all voters cast their ballots absentee. The vast increase in absentee voting was largely the result of the Covid-19 pandemic, which had led many states to allow some form of mail-in ballots to avoid exposing voters to the highly contagious virus in crowded voting places.

At a polling place in Springfield, Pennsylvania, voters line up to vote in the presidential election on November 3, 2020.

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There are significant differences in voter turnout by race and ethnicity, sex, age, educational attainment, and income. In the 2020 election, turnout was highest among non-Hispanic Whites (71 percent), somewhat lower for Blacks (63 percent), and considerably lower for Latinos (54 percent). Turnout also varied considerably with sex and age. Women voted at slightly higher rates than men (68 percent versus 65 percent), and older citizens voted at much higher rates than younger adults: 75 percent of eligible citizens 65 and older turned out to vote, compared with 71 percent of adults between the ages of 45 and 64, 63 percent of adults ages 25 to 44, and only 51 percent of adults ages 18 to 29. Education also influences voting behavior: Only 40 percent of persons who lacked a high school diploma turned out to vote, half the rate of those with bachelor's degrees or higher (80 percent). Turnout was just 52 percent among voters whose family income was less than $30,000, but rose to 83 percent among voters whose family income was over $100,000 (derived from U.S. Bureau of the Census, 2021c).

Voter turnout in the United States, even in a record voting year like 2020, is among the lowest in economically developed democracies. By way of comparison, in Australia 90 percent of registered voters voted in the most recent election; in Belgium, 88 percent; in Sweden, 84 percent; and in

Turkey, 89 percent (DeSilver, 2022). While the difference is due to many factors, one stands out: In the United States, it is more difficult to vote than in many other countries. When such difficulty was eased as a result of Covid-19-induced mail-in voting in 2020, turnout increased. Easier voting can also be accomplished by universal voter registration, by either registering all eligible voters automatically or requiring them to register. More than half of all countries in the world have some form of universal voter registration. In the United States, which lacks universal registration, more than a quarter of eligible voters—some 63 million citizens—were not registered to vote in 2020 (Chamie, 2021; Schumacher & Connaughton, 2020). Twenty-two countries, including Australia, Belgium, and Turkey, even have laws that *require* eligible citizens to vote. While penalties for failing to vote are generally mild and the laws are not always rigorously enforced, they clearly make a difference: The average turnout in the most recent elections in countries that mandate voting was 74 percent (International Institute for Democracy and Electoral Assistance, 2023). The timing of elections can also make a difference. In most advanced industrial countries, either elections are on a weekend or election day is declared a national holiday, which makes it easier for working people to vote. Under a federal statute dating back to 1845, U.S. national elections are held on the first Tuesday in November. This made sense in the mid-nineteenth century, when nearly two-thirds of Americans were farmers who needed to finish their fall harvest, harness up their horse and buggy, and take a day or two getting to the polls. Today, however, it means most Americans need to vote either before or after work, or else somehow manage to juggle their working hours (DeSilver, 2018b).

Apart from ease of voting, another reason for low turnout involves winner-take-all elections, which discourage the formation of third parties. As a result, voters may feel they lack viable choices; a large (and growing) number of people clearly believe that the current system is unresponsive to their needs. As we have seen, in many countries, including most European countries, some system of proportional representation is practiced, under which parties receive seats in proportion to the votes they get in electoral districts. Under such a system, even small parties can often muster sufficient support to elect one or two representatives. When voters have a wider range of choices, they are more likely to vote.

Finally, restrictive voting laws can also discourage voting. Although no evidence of systematic voter fraud was found in the 2020 elections, 19 Republican-led states passed laws aimed at preventing possible fraud in the future by limiting mail-in and early voting, enacting more stringent voter ID requirements, or making it easier to purge voters who haven't voted in recent elections. Twenty-five states—mainly Democratic led, although including some Republican-led states as well—provided for expanded voting by increasing access for voters with disabilities, providing greater early-voting opportunities, or (in a few Democratic-led states) easing mail-in voting (Brennan Center for Justice, 2021). Critics of restrictive voting laws argue that they will make it more difficult to vote and will most severely affect minority and poor voters who tend to vote Democratic. Any electoral impact, however, will most likely be felt in swing states such as Michigan, Arizona, Georgia, Florida, and Virginia, where, as we have seen, a handful of votes can change the outcome of an election (Kamarck, 2021).

# Is Social Media a Force for Democracy—or Demagoguery?

While social media has the ability to foster democracy by encouraging widespread engagement in politics, information sharing, and the building of social movements, it also invites the participation of demagogues, extremists, internet trolls seeking to create conflict, and foreign governments trying to interfere in domestic politics. Social media can appeal to our best—and worst—impulses. The declining influence (and financial fortunes) of mainstream media has created an opening for the more direct communication that is made possible by the internet and social media—a world in which anyone with a smartphone or laptop computer can become a blogger, a source of information, an influencer, or a potential player in a presidential election or its aftermath.

To the extent that established institutions lose their power, social media can fill the political void in a way that favors social movements: It enables the leaders of social movements to directly reach their followers, without the need for established political parties or mainstream media. Will this encourage the rise of pro-democracy movements—as it did briefly in the Arab Spring of 2010–2012? Or will it fuel the rise of populist authoritarian social movements, as it has in Turkey, India, and

European countries such as Hungary, France, the Netherlands, Greece, Austria, Germany, and Sweden?

Antigovernment bloggers in Egypt gather in a Cairo café in Tahrir Square.

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"Stop the Steal" illustrates the increasingly important role of social media in mobilizing social movements. The phrase was first used in the Republican primaries in 2016, but the #StopTheSteal hashtag went viral for the first time on election day in 2020, when a Trump activist who was certified as a poll watcher was inappropriately denied admission to a Philadelphia polling place. The video was tweeted by Trump's election day operations director, whose tweet claimed, "TRUMP observers are being blocked entry to all of the satellite voting locations in Philly!! What are they hiding?" The tweet occurred at 8:19 A.M.; it was immediately retweeted by "repeat spreaders," including conservative cable networks and pro-Trump activists (including Donald Trump Jr.) with millions of followers. Within an hour, the video had been viewed on Twitter nearly a half million times—as well as on Facebook, Instagram, and TikTok (Alcorn, 2021). A single event, involving what was later found to be an entry denial by a misinformed worker, went viral. "Stop the Steal" became the rallying cry behind January 6, 2021, and a year later, in January 2022, a national poll found that 22 percent of adult Americans still believed the election was stolen—including more than half of all

Trump voters or persons who got their news from Fox or conservative media (Ipsos, 2022).

The more well-established sites are under increasing pressure to avoid inflammatory or offensive content. Twitter (2021), for example, permanently suspended Trump's account (at the time he had 89 million followers) two days after the January 6 riots under its "Glorification of Violence" policy, on the grounds that his tweets "were highly likely to encourage and inspire people to replicate the criminal acts that took place at the U.S. Capitol on January 6, 2021." In response to what some regard as mainstream social media censorship, a number of other sites have emerged with far more permissive standards, claiming that the First Amendment guarantee of free speech gives them a constitutional right to post uncensored content. 8kun (formerly 8chan) was home to the previously discussed QAnon conspiracy theory, as well as racist, White supremacist, and neo-Nazi postings; it was reportedly used by January 6 rioters to plan their efforts. Several conservative social media platforms have also emerged in response to restrictions on established sites, including Parler, Gab, and Gettr; Truth Social was established by Trump in 2022 (Haggin & Bender, 2021).

The use of social media has had far-reaching effects on protests and social movements worldwide, showing how protests in one country can result in activism in others. The Arab Spring protests, a series of pro-democracy protests that began in Tunisia in 2010 and swept the Middle East in 2011, called for the overthrow of corrupt authoritarian governments. The image of youthful protesters, often risking their lives, instantly traveled the world through social media, inspiring large protests across the globe (Kulish, 2011). In India, hundreds of thousands of disillusioned young people supported rural activist Kisan Baburao "Anna" Hazare in his hunger strike. Hazare starved himself for 12 days until the Indian Parliament met some of his demands to implement an anticorruption measure. In Israel, an estimated 430,000 people gathered in Tel Aviv, Jerusalem, and Haifa to protest high unemployment, high costs of living, and other social injustices. "Black Lives Matter" protests, which originated in the United States, contributed to anti-racist protests in Germany, Italy, Denmark, and Poland (Milman et al., 2021).

Yet the power of social media–generated social movements does not always lead to the desired social change. The Arab Spring protests were suppressed through government censorship of social media as well as

violent repression. While the overthrow of Egyptian president Hosni Mubarak did produce the first democratic election in Egyptian history, the winner of the election—Mohamed Morsi, a leading member of the Muslim Brotherhood—soon issued a constitutional declaration giving himself virtually unlimited power. This triggered another wave of popular protests, which unfortunately did not result in a peaceful return to greater democracy. Instead, the Egyptian military staged a coup. Morsi was imprisoned and eventually sentenced to death; he reportedly died of a heart attack in 2019. Thousands of Morsi's followers were killed or imprisoned by the Egyptian military, and Egypt returned to the autocratic rule that had prompted its Arab Spring uprisings in the first place. Yemen and Libya descended into civil war, with armed factions—often supported by outside powers—laying waste to cities and villages. Protests in Syria were brutally suppressed by the Assad regime, drawing the United States and Russia into opposite sides in a civil war that forced millions of refugees to flee into Europe. These unfortunate developments, in turn, resulted in a rise of anti-immigrant political movements throughout Europe and have threatened the European Union's open-border policy—one of the key components of European unity. Social media has also played a role in the rise of nationalist parties elsewhere in Europe that are calling for an end to the European Union (Polakow-Suransky, 2016). Social media has also been effectively used by Islamic extremists to recruit supporters for terrorist actions (Blaker, 2015).

Social media is a potentially democratizing force, although it can have the opposite effect—for example, when governments control what is acceptable, or when extremists use their websites to mobilize support for acts of violence. Social media clearly cuts both ways: It can be used by social movements for democratic purposes, or it can be used to promote violence. The rapid worldwide explosion of internet use and social media has left governments struggling to determine how best to achieve a balance between freedom of speech and the need to censor misleading or dangerous information.

# Is U.S. Democracy in Trouble?

Democracy almost everywhere is in some peril. This is not only because it is hard to set up a stable democratic order in places such as Russia and other formerly communist societies. Democracy is in trouble even in its

countries of origin—such as the United States. For example, as we have seen, trust in government has declined steadily over the past 60 years—the number of Americans reporting that they “trusted the federal government to do the right thing almost always or most of the time” has decreased from three out of every four to one out of every four. These trends are almost identical regardless of political party affiliation, although trust tends to be somewhat higher among members of the party that controls the White House at any given time. Surveys conducted in April 2021 found that Generation Z (born between the late 1990s and early 2010s), which includes most of the readers of this textbook, has the lowest level of trust (17 percent) of any generation (Pew Research Center, 2022a).

Roughly half of all Americans believe that government is too large, a perception that in part reflects this low level of trust (Pew Research Center, 2019a). Yet among the 34 industrial democracies for which data are available at the Organisation for Economic Co-operation and Development (OECD), the United States ranks 26th in terms of total federal, state, and local government spending as a proportion of its total economy (38 percent). Six OECD countries spend more than half of their GDP on government at all levels, with France (59 percent) and Greece (57 percent) topping the list (OECD, 2021). There are, however, significant differences among those who believe that government is too big. One obvious difference is partisanship: While roughly three-quarters of Republicans and Republican-leaning independents prefer a smaller government providing fewer services, two-thirds of Democrats and Democratic-leaning independents prefer a large government that provides more services. There are significant differences by age as well: While 50 percent of younger Americans (30 and under) favor larger government, only 43 percent of those over 65 share this opinion (Pew Research Center, 2019a).

Americans may have lower taxes than other industrial democracies, but they also receive lower levels of support for health care, housing, education, unemployment, and social services in general. This may be another reason for low levels of confidence in government and poor voter turnout: Americans expect less, and get less, from their government.

Finally, there has been a steady stream of well-financed criticism from conservative think tanks, news media, and politicians who share the belief that government is part of the problem, rather than part of the

solution. This has been highly effective in changing the national discourse on the role of government (Domhoff, 2022; Hooijer & King, 2021; Springer, 2021).

Why are so many people dissatisfied with democracy, a political system that not long ago seemed to be sweeping across the world? The answers may be bound up with the very factors that help spread democracy—the effect of capitalism and the globalizing of social life. For instance, while capitalist economies generate more wealth than any other type of economic system, the wealth is unequally distributed (see Chapter 8). And economic inequalities influence who votes, joins parties, and gets elected. Wealthy individuals and corporations back interest groups that lobby elected officials to support their aims when deciding on legislation. Not being subject to election, interest groups are not accountable to the majority of the electorate.

Economic inequalities also create an underclass of people living in poverty—about 20 percent of the population of liberal democracies. Most Western liberal democracies establish policies to reduce poverty levels, but they vary in spending to achieve that aim. Societies that implement a complex welfare system require a higher level of taxation and a larger nonelected government bureaucracy. The question arises as to how much of an economic and political price a society is willing to pay to reduce poverty, who pays for it, and what the effect of this cost is.

In the modern welfare state, government has been expected to provide a wide range of services to be funded by taxes on individuals and corporations. During much of the twentieth century, when the economies of the advanced industrial nations were to a large extent based within national borders, this strategy met with some success—at least during times of economic growth, when businesses were thriving, personal incomes were rising, and government revenues were strong. Political parties tried to woo voters by promising many benefits and services; as a result, governments acquired more responsibilities than they could easily fund and manage, from establishing public ownership of industries, utilities, and transportation to creating extensive welfare programs.

A half century ago, sociologist James O'Connor's *Fiscal Crisis of the State* (1973) predicted that a gap would occur between state expenditures and revenues. Globalization, which facilitated the easy movement of capital, has contributed to this crisis. The offshoring of manufacturing to

low-wage countries contributed to the decline of manufacturing in the United States and, with it, the loss of millions of jobs that once paid middle-class wages. This both reduced personal income available for taxation and contributed to an increase in the cost of such government-funded services as unemployment compensation and welfare payments. During the twenty-first century, automation has arguably claimed as many, or many more, jobs than the offshoring of manufacturing, a trend that is likely to increase in coming years (see Chapter 14). Taxes on corporations, as a portion of federal revenues, have also declined: In 1970, corporate income taxes accounted for 25 percent of federal government revenue, while in 2018, the corporate share had dropped to only 6 percent (Center on Budget and Policy Priorities, 2019). At only 1 percent of GDP, corporate income tax revenue in the United States is the lowest among the so-called G7 advanced industrial economies (Japan, Canada, Britain, France, Germany, Italy, and the United States) (Peter G. Peterson Foundation, 2023).

Jürgen Habermas (1975) argued that this situation should be understood as a legitimation crisis (Offe, 1984, 1985), since modern governments lack the legitimacy to carry out tasks they are required to undertake, such as providing highways, public housing, and health care. People who feel that they pay most for these services through higher taxes—the more affluent—may believe they gain the least from them. On the one hand, governments must take more responsibility for reducing poverty and homelessness; on the other, taxpayers either resist increases in taxation or want taxes reduced. Governments cannot cope with the contradictory demands of lower taxes and more responsibilities, leading to decreased public support and general disillusionment about government's capabilities. According to Habermas, legitimation crises could probably be overcome if the electorate was persuaded to accept high taxation in return for a wide range of government services.

At the same time that governments have shrunk in relation to global issues, they have become more remote from the lives of most citizens. Many Americans resent that "power brokers" in Washington—party officials, interest groups, lobbyists, and bureaucratic officials—make decisions affecting their lives. They also believe that government is unable to address important local issues, such as crime and homelessness. Thus, Americans' faith in government has dropped substantially, which affects Americans' willingness to participate in the political process.

**CONCEPT CHECKS**

1. **What are the reasons that voter turnout is so low? How could it be improved?**
2. **How might the internet be used to stifle movements for democracy?**
3. **Provide two explanations for the current tide of dissatisfaction with democracy.**

# Glossary

legitimation crisis
: The failure of a political order to be able to govern properly because it did not generate a sufficient level of commitment and involvement on the part of its citizens.

# THE BIG PICTURE

# Chapter 13

## Government, Political Power, and Social Movements

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**Exercises:** Thinking Sociologically

1. Discuss the differences between the pluralistic and the power elite theories of democratic political processes. Which theory do you find most appropriate to describe U.S. politics in recent years?
2. Your textbook offers a variety of explanations on the formation of social movements. Briefly review the predisposing conditions for social movements, and then discuss their relevance to the rise of nationalist movements in the developing world.

# BASIC CONCEPTS p. 471

## Learning Objectives

Understand basic ideas underlying modern nation-states and social movements. Learn about different types of democracy.

## Terms to Know

social movements • democracy • participatory democracy • representative democracy • liberal democracy • monarchy • constitutional monarchy • authoritarianism • populism • civil society • nation-states • nation • state • sovereignty • failed states • nationalism • local nationalism • power • authority • influence • citizens • civil rights • political rights • social rights • welfare state • revolutions

### Concept Checks

1. Why is participatory democracy not a viable option for most modern states?
2. Describe three characteristics of the state.
3. What is the welfare state? Can the United States be classified as a welfare state? Why?

## WHO RULES? THEORIES OF DEMOCRACY p. 480

### Learning Objectives

Learn the key theories about power in a democracy.

### Terms to Know

democratic elitism • pluralist theories of modern democracy • power elite

### Concept Checks

1. According to Weber, what are the necessary conditions for democratic systems to be effective?
2. Compare and contrast pluralist theories of modern democracy and the power elite model.

## RECENT RESEARCH ON U.S. POLITICS AND SOCIAL

# MOVEMENTS p. 487

## Learning Objectives

Learn about some of the trends associated with modern-day democracy. Assess the effect of globalization and technology on social movements today. Learn about nationalism and the importance of nationalist movements.

## Terms to Know

interest group • lobbying • labor unions • structural strain • collective action • relative deprivation • new social movements • nations without states

## Concept Checks

1. How does the two-party system in the United States affect political involvement?
2. Describe the role that interest groups play in American politics.
3. What role has technology played in social movements?
4. Describe the arguments given for the persistence of the nation-state.

# UNANSWERED QUESTIONS p. 513

## Learning Objectives

Understand why voter turnout in the United States is low and consider the role that the internet played in the 2020 election. Evaluate whether democracy is in trouble.

## Terms to Know

legitimation crisis

## Concept Checks

1. What are the reasons that voter turnout is so low? How could it be improved?
2. How might the internet be used to stifle movements for democracy?
3. Provide two explanations for the current tide of dissatisfaction with democracy.

# Glossary

social movements
: Large groups of people who seek to accomplish, or to block, a process of social change. Social movements normally exist in conflict with organizations whose objectives and outlook they oppose. However, movements that successfully challenge power, once they become institutionalized, can develop into organizations.

democracy
: A political system that allows the citizens to participate in political decision making or elect representatives to government bodies, enabling them to directly or indirectly decide the laws under which they will live.

participatory democracy
: A system of democracy in which all members of a group or community participate collectively in making major decisions.

representative democracy
: A form of democracy in which citizens elect to governing bodies representatives who then vote on laws and policies.

liberal democracy
: A type of representative democracy in which elected representatives hold power.

monarchy
: A system of government in which an unelected king or queen rules.

constitutional monarchy
: A system of government in which a king or queen is largely a figurehead and real power rests in the hands of other political leaders.

authoritarianism
: A political system in which the governing bodies or leaders use force to maintain control.

populism
: The belief that politics should reflect the needs and interests of ordinary people rather than those of elite individuals or groups.

civil society
: The realm of activity that lies between the state and the market, including the family, schools, community associations, and noneconomic institutions. Civil society, or civic culture, is essential to vibrant democratic societies.

nation-states
: Particular types of states, characteristic of the modern world, in which governments have sovereign power within defined territorial areas, and populations are citizens who know themselves to be part of single nations.

nation
: People with a common identity that ideally includes shared culture, language, and feelings of belonging.

state
: A political apparatus (government institutions plus civil service officials) ruling over a given territorial order, whose authority is backed by law and the ability to use force.

sovereignty
: The undisputed political rule of a state over a given territorial area.

failed states
: States in which the central government has lost authority and resorts to deadly force to retain power.

nationalism
: A set of beliefs and symbols expressing identification with a national community.

local nationalism
: The belief that communities that share a cultural identity should have political autonomy, even within smaller units of nation-states.

power
: The ability of individuals or the members of a group to achieve aims or further the interests they hold. Power is a pervasive element in all human relationships. Many conflicts in society are struggles over power, because the amount of power an individual or group holds governs its ability to put its wishes into practice.

authority
: A government's legitimate use of power.

influence

The ability to affect others' behavior without coercion or other forms of direct control.

citizens

Members of a political community, having both rights and duties associated with that membership.

civil rights

Legal rights held by all citizens in a given national community.

political rights

Rights of political participation, such as the right to vote in local and national elections, held by citizens of a national community.

social rights

Rights of social and welfare provision held by all citizens in a national community, including, for example, the right to claim unemployment benefits and sickness payments provided by the state.

welfare state

A political system that provides a wide range of welfare benefits for its citizens.

revolutions

Processes of political change involving the mobilizing of a mass social movement, which, by the use of violence, successfully overthrows an existing regime and forms a new government.

democratic elitism

A theory of the limits of democracy. It holds that in large-scale societies democratic participation is necessarily limited to the regular election of political leaders.

pluralist theories of modern democracy

Theories that emphasize the role of diverse and potentially competing interest groups, none of which dominate the political process.

power elite

Small networks of individuals who, according to C. Wright Mills, hold concentrated power in modern societies.

interest group

A group organized to pursue specific interests in the political arena, operating primarily by lobbying the members of legislative bodies.

lobbying

The act of persuading influential officials to vote in favor of a cause or otherwise lend support to the aims of an interest group.

labor unions

Organizations that advance and protect the interests of workers with respect to working conditions, wages, and benefits.

structural strain
: Tension that produces conflicting interests within societies.

collective action
: Action undertaken in a relatively spontaneous way by a large number of people assembled together.

relative deprivation
: Deprivation one feels by comparing oneself with a group.

new social movements
: A set of social movements that have arisen in Western societies since the 1960s in response to the changing risks facing human societies. New social movements differ from earlier social movements in that they focus on a range of human rights as opposed to economic concerns, and thus draw support from across class lines.

nations without states
: Instances in which the members of a nation lack political sovereignty over the area they claim as their own.

legitimation crisis
: The failure of a political order to be able to govern properly because it did not generate a sufficient level of commitment and involvement on the part of its citizens.

# PART IV Social Institutions

**Social institutions are the cement of social life. They are the basic living arrangements that human beings work out with one another, by means of which continuity is achieved across the generations.**

**We begin in Chapter 14 with work and economic life. Although the nature of work varies widely both within and across societies, work is one of the most pervasively important of all human pursuits. In Chapter 15, we look at the institutions of kinship, marriage, and the family. Although the social obligations associated with kinship vary depending on the type of society, in each, families are the context within which the young are provided with care and protection. Marriage is more or less universally connected to the family because it is a means of establishing new kin connections and forming a household in which children are brought up. In traditional cultures, much of the direct learning a child receives occurs within the family context. In modern societies, children spend many years of their lives in special places of instruction outside the family—schools and colleges. They also are constantly fed images and information from the mass media.**

**Chapter 16 looks at the ways in which formal education is organized, concentrating particularly on the relationship between education and inequality. The subject of Chapter 17 is religion. Although religious beliefs and practices are found in all cultures, the changes affecting religion in modern societies have been particularly acute. We analyze the nature of these changes, considering in what ways traditional types of religion still maintain their influence.**

# 14 Work and Economic Life

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Which company makes your favorite athletic shoe?

1. **Nike**
2. **Reebok**
3. **Asics**
4. **Adidas**
5. **Puma**
6. **New Balance**
7. **Converse**
8. **Under Armour**
9. **Timberland**
10. **Rockport**

11. **Pou Chen**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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**LEARNING OBJECTIVES**

1. Basic Concepts Understand that modern economies are based on the division of labor and economic interdependence.
2. Theories of Work and Economic Life Consider the different forms that capitalism has taken, and understand how a shift in the predominant form of industrial organization in modern society has shaped the kinds of jobs people are likely to find.
3. Current Research on Work and Economic Life Recognize the importance of the rise of large corporations; consider particularly the global effect of transnational corporations. Learn about the challenges facing workers today, including growing unemployment, the decline of labor unions, the rise of low-wage work, and the global trading system.
4. Unanswered Questions Learn about the effect of automation on employment. Consider how work will change in the future.

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You may suspect that this is a trick question—but it isn't! Nor is it an infomercial for leading athletic shoe brands. Whatever your preferred brand, one thing is certain: Your favorite brand did not actually make the shoe you are wearing. Whether you buy a branded athletic shoe for running, walking, or cycling, or whether you prefer basketball, tennis, or soccer, your favorite brand's job was to design the shoe, launch an effective marketing campaign, and eventually convince you—and millions of others—that this particular shoe, in this particular style, and most likely at this (often seemingly outrageous) price, is the key to your athletic success, whether you are a weekend walker or a national track star.

The company that actually made your favorite athletic shoe has a one in five chance of bearing a name that you most likely have never heard of: Yue Yuen, a subsidiary of the Taiwanese firm Pou Chen, is the world's largest manufacturer of branded athletic and casual shoes. Its 317,000 workers in China, Vietnam, Indonesia, Bangladesh, Myanmar, Cambodia, and Taiwan turned out 238 million pairs of shoes in 2021, reportedly

accounting for approximately 20 percent of branded athletic and casual footwear sold in the world (Wu, 2019; Yue Yuen, 2022). Yue Yuen's sprawling factory in Dongguan, in southern China, produces nearly a million pairs of athletic shoes a month for Nike, Adidas, Reebok, New Balance, Asics, and practically every other major brand. Working with these numerous brands, Yue Yuen engages in research to develop the best materials to use in its products; has developed its own advanced manufacturing technology; and is engaged in high-tech logistics, coordinating its global supply chain to ensure that all the components required in shoe manufacture are acquired in a timely fashion (Appelbaum & Lichtenstein, 2006; Dun & Bradstreet, 2023; Yue Yuen, 2023).

Yet all is not rosy in Yue Yuen factories. On April 14, 2014, some 45,000 workers in the company's Dongguan factories went on strike. The 10-day strike occurred when it was discovered that Yue Yuen had been systematically underpaying its state-mandated social insurance and housing benefits to its workers. The workers demanded complete restitution of the missing payments, as well as a higher living allowance. The strike, which shuttered factories and cost Yue Yuen $27 million in lost business, ended when the Chinese government ordered Yue Yuen to pay up. The settlement reportedly increased yearly employee costs some $31 million (Wong, 2014), which apparently did not sit well with the company and was one reason it decided to open its Myanmar factory. And although Yue Yuen's profits reached nearly a half billion dollars in 2017, the firm refused to comply with a Cambodian Arbitration Council ruling that the company compensate 478 workers who were entitled to severance pay when Yue Yuen closed the factory—a payout that would have cost Yue Yuen less than a million dollars.

Pou Chen/Yue Yuen is an example of an important development in the global economy, one that is reshaping the nature of work throughout the world. Countries once referred to as "developing economies"—now frequently termed "emerging economies"—are playing an increasingly important role as suppliers and assemblers of the products consumed throughout the world. Design and marketing may remain centered in the United States, Europe, Japan, and a few other advanced economies, but the actual goods are produced by independently owned factories throughout the world. Giant transnational corporations—owned by individuals from China, Hong Kong, South Korea, and Taiwan—operate

apparel, electronic assembly, and other consumer goods factories around the world.

Global supply chains today dominate the world economy, shaping the nature of work and economic life. While they have provided an enormous array of low-cost consumer goods, they have also resulted in the relocation of many jobs to low-wage countries where the goods are produced—countries in which labor laws and environmental protections are either nonexistent or poorly enforced. A majority of workers in global supply chains are female, especially in such low-wage manufacturing sectors as apparel, footwear, and electronic assembly. They often work under harsh, unsafe, and physically abusive conditions (Appelbaum & Lichtenstein, 2016; see Chapter 9). Yet for some, such work has provided a pathway to an economically better life. There are benefits and costs to global production systems, both in the advanced industrial economies and in the emerging economies. In this chapter we will examine both sides of global production, in order to gain a better understanding of its effects on American workers.

When you buy a pair of jeans, whatever its brand might be, it may well have been made anywhere in the world where wages are low enough to offset the cost of shipping the jeans to a retail outlet that may be a half a world away. To take one example, in 2023 Gap, which every year publishes a list of its contract factories, hired almost 700 factories in nearly two dozen different countries (Gap Inc., 2023). The sweatshirt or hoodie sold in your campus bookstore—the one that bears your college's logo or name—was certainly not made by your college, nor was it made by Nike, Russell Athletic, or Knights Apparel, three of the leading brands that design products specifically for the college market. It, too, was made in a factory overseas, anywhere from the Caribbean to China.

The Pou Chen/Yue Yuen case illustrates another important point: Workers are becoming more militant everywhere. Even in China, where the government has never approved of labor unrest, workers until fairly recently were able to engage in unauthorized strikes to protest low wages and poor working conditions. Today, the Chinese government has taken an increasingly hard-line position on worker unrest, severely punishing workers who even speak out against factory conditions. Businesses also respond to worker militancy, and the rising wages it often produces, by moving to lower-cost areas such as Vietnam and Myanmar, where the government is more likely to quickly repress strikes. This dynamic

greatly affects work and economic life in the United States, as many manufacturing jobs—and increasingly service-sector jobs, from accounting to software engineering—have moved in recent years to low-wage countries. What kinds of jobs are replacing them back home? What does it mean for the nature of work when brands such as Nike or retailers such as Walmart rely on foreign firms halfway around the world to actually manufacture the products that bear their names or are sold on their shelves? And, importantly, how likely is this process of offshoring production likely to continue? The United States is currently reevaluating its trade relationships; one thing that both political parties seem to agree on is the need to "bring the jobs back home." China, which for years has served as the world's factory, is becoming a high-tech power, more focused on designing computer chips than making shoes or clothing. All of these changes will affect the world of work, in ways that are not easily predicted.

Countries such as China have played a central role as suppliers and assemblers of the products consumed across the globe. Rising wages in China, however, have led some firms to relocate production to lower-wage countries such as Vietnam and Cambodia.

Most adults in modern economies spend the better part of their waking hours at work. The jobs they do determine their economic prospects, shape their lifestyles, and provide them with friends and acquaintances.

Yet the nature of work is often determined by forces far beyond their control, and sometimes even beyond their understanding. In this chapter, we analyze the nature of work in modern societies and look at the major changes affecting economic life today. We investigate the changing nature of industrial production, the ownership structure of large business corporations, and the changing nature of work itself. We then turn to some important unresolved questions about our economic future.

# 1 BASIC CONCEPTS

**Understand that modern economies are based on the division of labor and economic interdependence.**

Work can be defined as the carrying out of tasks that require the expenditure of mental and physical effort; it has as its objective the production of goods and services that cater to human needs. An occupation, or job, is work that is done in exchange for a regular wage, or salary. In all cultures, work is the basis of the economic system, or economy. The economy consists of institutions that provide for the production and distribution of goods and services.

Modern societies are capitalistic. Capitalism is an economic system based on the private ownership of wealth, which is invested and reinvested in order to produce profit. It is distinguished by the following important features: private ownership of the means of production; profit as incentive; competition that drives a search for markets to sell goods; the competitive need to lower the cost of production, resulting in the globalization of supply chains to low-wage countries; the adoption of "labor-saving" technologies that cut labor costs; and investment of profits aimed at business expansion.

While some form of capitalism has existed ever since people began to trade goods with one another, it took its modern, global form with the growth of the Industrial Revolution in the early nineteenth century. Modern capitalism is a vastly more dynamic economic system than any other that preceded it in history; it is now the most widespread form of economic organization in the world. Modern industry differs in a fundamental way from premodern systems of production, which were primarily based on agriculture. In modern societies, in contrast, most people no longer work on farms or in fields. In economically advanced economies such as the United States, large numbers no longer work in factories, as was the case for much of the twentieth century. Rather, in such countries today's jobs involve providing services to others—services that range from those contributed by high-paid professionals, such as managers of giant corporations, to those administered by low-

paid workers requiring limited skills and training, such as salesclerks at Walmart.

The study of economic institutions is of major importance in sociology because the economy influences all segments of society and, therefore, social life in general. And economic institutions are themselves always changing. One reason for such change is technology, which harnesses science to machinery, electronics, and even biology to produce an ever-increasing variety of goods more cheaply. Another reason is globalization, which creates global competition among not only firms but also workers: Whether you are an autoworker in a Detroit factory, an engineer in Silicon Valley, or a graphic designer in New York City, someone half a world away likely has the skill, talent, and drive to challenge you for your job.

We often associate the notion of work with drudgery—a set of tasks that we want to minimize and, if possible, escape altogether. (You may have this very thought in mind as you set out to read this chapter!) Is this most people's attitude toward their work, and, if so, why? We will try to find out in the following pages.

Work is more than just drudgery, or people would not feel so lost and disoriented when they become unemployed. How would you feel if you thought you would never get a job? In modern societies, having a paid job is important for maintaining self-esteem, as well as paying the bills. Even when work conditions are relatively unpleasant and the tasks involved are dull, work tends to be a structuring element in people's psychological makeup and the cycle of their daily activities. Several characteristics of work are relevant here:

- *Money.* A wage or salary is the main resource many people depend on to meet their needs. Without such an income, anxieties about coping with day-to-day life tend to multiply. Economies are no longer based largely on barter—the personal exchange of physical goods or services—which remained a dominant economic form in many places before being replaced by modern global capitalism.
- *Activity level.* Work often provides a basis for the acquisition and exercise of skills and capacities. Even when work is routine, it offers a structured environment in which a person's energies may be absorbed. Without it, the opportunity to exercise such skills and capacities may be reduced.

- *Variety.* Work provides access to contexts that contrast with domestic surroundings. In the working environment, even when the tasks are relatively dull, individuals may enjoy doing something different from home chores.
- *Structuring one's time.* For people in regular employment, the day is usually organized around the rhythm of work. Although work may sometimes be oppressive, it provides a sense of direction in daily activities. Those who are out of work frequently find boredom a major problem and may develop a sense of apathy about time.
- *Social contacts.* The work environment often provides friendships and opportunities to participate in shared activities with others. Separated from the work setting, a person's circle of possible friends and acquaintances is likely to dwindle.
- *Personal identity.* Work is usually valued for the sense of stable social identity it offers. For men in particular, self-esteem is often bound up with the economic contribution they make to maintaining the household. In addition, job conditions—such as the opportunity to work in jobs that are challenging, not routinized, and not subject to close supervision—are known to have a positive effect on a person's sense of self-worth (Crowley, 2014).

Against the backdrop of this formidable list, it is not difficult to see why being without paid employment may undermine individuals' confidence in their social value. Yet even though we often think of work as equivalent to having a paid job, in fact, this is an oversimplified view. Housework, which has traditionally been carried out mostly by women, is usually unpaid. But it is work nonetheless, sometimes satisfying, often difficult and exhausting. Unpaid housework includes such things as having primary responsibility for raising children, cleaning, shopping, and attending to countless (and unending) household chores. It typically involves one of the most important tasks of any society: the socialization of children, a crucial step in preparing them for adulthood.

When the New York City Marathon got canceled after Superstorm Sandy, many runners who had planned to race turned to volunteer cleanup efforts instead. What social role does such unpaid labor play?

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One study found that in 1965 women put in an average of 40 hours per week on household work. Today an increasing number of women have joined the paid workforce, yet when they return home from their paid employment, they are still likely to do most of the housework and childcare—tasks that sociologist Arlie Hochschild (1989) described as women's "second shift." Household work still tends to be gendered: Men are more likely to do outdoor work or repairs that can fit into their schedules, while women are more likely to do such routine daily work as shopping, housecleaning, laundry, and child care (Quadlin & Doan, 2018). It is estimated that on the days they engaged in household activities, women spent an average of 2.7 hours on these activities, while men spent 2.2 hours. There are, however, significant differences in the types of household activities men and women performed, reflecting long-standing cultural differences in the division of labor. Routine housework remained "women's work," with men putting in a third as many hours as women; when it came to preparing meals (and cleaning up afterwards), men put in only half as many hours. At the same time, for outside work (such as lawn and garden care), men put in twice the number of hours as

women (U.S. Bureau of Labor Statistics [BLS], 2022i, 2022j). According to one estimate, if housework were monetized—that is, paid according to its true value—it would increase the U.S. gross national income (GNI) by nearly $1.5 trillion (Wezerek & Ghodsee, 2020).

Another form of unpaid labor that has an important social role involves volunteer work for charities or other organizations. According to one estimate, in 2018 about 63 million Americans—over one-fifth of all adults—contributed 8 billion hours of volunteer service, estimated as worth $203 billion (Independent Sector, 2019).

One of the most distinctive characteristics of the economic system of modern societies is the existence of a highly complex division of labor: Work has become divided into an enormous number of different occupations in which people specialize. In traditional societies, nonagricultural work entailed the mastery of a craft. Workers learned craft skills through a lengthy period of apprenticeship, with the worker normally carrying out all aspects of the production process from beginning to end. For example, a metalworker making a plow would forge the iron, shape it, and assemble the implement itself. With the rise of modern industrial production, most traditional crafts have disappeared altogether, replaced by skills that form part of more large-scale production processes. An electrician working in an industrial setting today, for instance, may inspect and repair only a few parts of one type of machine; different people will deal with the other parts and other machines.

The contrast in the division of labor between traditional and modern societies is truly extraordinary. Even in the largest traditional societies, there usually existed no more than 20 or 30 major craft trades, together with such specialized pursuits as merchant, soldier, and priest. A modern industrial system has literally thousands of occupations. The U.S. Bureau of the Census (2022a) lists more than 32,000 different jobs in the American economy. In traditional communities, most of the population worked on farms and were economically self-sufficient. They produced their own food and clothes, as well as other necessities of life. One of the main features of modern societies, by contrast, is an enormous expansion of economic interdependence. We all depend on an immense number of other workers—today stretching right across the world—for the products and services that sustain our lives. With few exceptions, the vast majority of people in modern societies do not grow the food they eat, build the

houses in which they live, or produce the material goods they consume. Moreover, as you learned from the chapter opener, the division of labor is now truly global, since the components of virtually all products are sourced from many factories in different countries.

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**CONCEPT CHECKS**

1. **Describe six characteristics that shape one's everyday experiences at work.**
2. **Name two forms of unpaid labor.**
3. **Contrast the division of labor in traditional and modern societies.**

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# Glossary

work
: The activity by which people produce from the natural world and so ensure their survival. Work should not be thought of exclusively as paid employment. In traditional cultures, there was only a rudimentary monetary system, and few people worked for money. In modern societies, there remain types of work that do not involve direct payment (e.g., housework).

occupation
: Any form of paid employment in which an individual regularly works.

economy
: The system of production and exchange that provides for the material needs of individuals living in a given society. Economic institutions are of key importance in all social orders. What goes on in the economy usually influences other areas of social life. Modern economies differ substantially from traditional ones because the majority of the population is no longer engaged in agricultural production.

capitalism
: An economic system based on the private ownership of wealth, which is invested and reinvested in order to produce profit.

technology

The application of scientific knowledge of the material world to production, involving the creation of material instruments (such as machines) used in human interaction with nature.

housework

Unpaid work carried out in the home, usually by women; domestic chores such as cooking, cleaning, and shopping. Also called *domestic labor*.

division of labor

The specialization of work tasks by means of which different occupations are combined within a production system. All societies have at least some rudimentary form of division of labor, especially between the tasks allocated to men and those performed by women. With the development of industrialism, the division of labor became vastly more complex than in any prior type of production system. In the modern world, the division of labor is international in scope.

economic interdependence

In the division of labor, the dependence of individuals on others to produce many or most of the goods they need to sustain their lives.

# 2 THEORIES OF WORK AND ECONOMIC LIFE

**Consider the different forms that capitalism has taken, and understand how a shift in the predominant form of industrial organization in modern society has shaped the kinds of jobs people are likely to find.**

To better understand the social organization of work, we first consider the different forms that capitalism has taken, before turning to a discussion of two broad types of economic organization in modern society that play a central role in shaping the kinds of jobs people are likely to find: Fordism and post-Fordism.

## Types of Capitalism

There have been at least four general stages in the development of business corporations, although each overlaps with the others and all continue to coexist today. Some sociologists see a fifth stage emerging as well.

The first stage, characteristic of the nineteenth and early twentieth centuries, was dominated by family capitalism. Large firms were run either by individual entrepreneurs or by members of the same family, and then passed on to their descendants. The famous corporate dynasties, such as the Rockefellers and Fords, belong in this category. These individuals and families did not just own a single large corporation but held a diversity of economic interests and stood at the apex of economic empires.

Most of the big firms founded by entrepreneurial families have since become public companies—that is, shares of their stock are traded on the open market—and have passed into managerial control. But important elements of family capitalism remain, even within some of the largest publicly traded corporations. Australian-born Rupert Murdoch, who turned 92 in 2023, took over his father's struggling media business in

1953, building it into the News Corporation (better known as News Corp), a global mass media and entertainment empire. In 2012, Murdoch split the media and entertainment sides into two family-run powerful business giants: Fox Corporation (which includes Fox News, Fox Sports, Fox Television Stations, and Fox Entertainment) and News Corp (*The Wall Street Journal*, Dow Jones, *Barron's*, HarperCollins Publishing, the *New York Post*, and a host of other global "media and information services"). Murdoch is the chair of the Fox Corporation Board of Directors, and his son Lachlan is the board's executive chair, as well as the corporation's chief executive officer. The father-son roles are reversed at News Corp, where Rupert Murdoch is the board's executive chair, while Lachlan serves as co-chair and chief executive officer.

Among small firms, such as local owner-run shops and small plumbing and house-painting businesses, family capitalism continues to dominate. Some of these firms, such as shops that have remained in the hands of the same family for two or more generations, are also dynasties, albeit on a minor scale. However, the small-business sector is highly unstable, and economic failure is common; the proportion of firms owned by members of the same family for extended periods is minuscule.

In the large corporate sector, family capitalism was increasingly succeeded by the second stage, managerial capitalism. As managers came to have more and more influence through the growth of very large firms, the entrepreneurial families were displaced. The result has been described as the replacement of the family in the company by the company itself. The company no longer is privately owned by the founding family, but rather is publicly traded on the stock market, in theory giving everyone an opportunity to buy shares and become an owner (although as we have just seen in the case of the Murdoch businesses, family influence and control can sometimes remain firmly entrenched). The corporation thus emerged as a more defined economic entity, with professional management—although as we shall see later in this chapter, ownership (and therefore a degree of control) is likely concentrated in a relatively small number of shareholders. There is no question that managerial capitalism has left an indelible imprint on modern society. The large corporation drives not only patterns of consumption but also the experience of employment in contemporary society—as large corporations have moved much of their production overseas, the work lives of many Americans have changed. Those changes have often

involved the loss of higher-paying jobs in large, unionized factories, and their replacement with lower-paying service jobs, from serving food in restaurants to driving for Lyft or Uber.

English classes were one of the services offered by large firms practicing welfare capitalism in the late nineteenth and early twentieth centuries.

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Sociologists have identified another area in which the large corporation has left a mark on modern institutions. Representing the third stage in the development of business corporations, welfare capitalism refers to a practice that sought to make the corporation—rather than the state or trade unions—the primary shelter from the uncertainties of the market in modern industrial life. Beginning at the end of the nineteenth century, large firms began to provide certain services to their employees, including child care, recreational facilities, profit-sharing plans, paid vacations, and life and unemployment insurance. By the end of World War II, many corporations, as well as public employers such as governments and educational institutions, also began to offset much of the cost of purchasing private medical insurance for their employees. These programs often had a paternalistic bent, such as sponsoring "home

visits" for the "moral education" of employees. Viewed in less benevolent terms, welfare capitalism had coercion as one of its major objectives, as some employers deployed all manner of tactics, including violence, to avoid unionization. As such, conventional histories typically suggest that welfare capitalism met its demise in the Great Depression years, as labor unions achieved unprecedented levels of influence and as the New Deal administration began to guarantee many of the benefits provided by firms.

In contrast to this standard interpretation, others argue that welfare capitalism did not die but instead went underground during the height of the labor movement (Jacoby, 1998). In firms that avoided unionization during the period between the 1930s and 1960s—such as Kodak, Sears, and Thompson Products—welfare capitalism was modernized, shedding blatantly paternalistic aspects and routinizing benefit programs. When the union movement began to weaken after 1970 (discussed later in this chapter), these companies offered a model to other firms such as Walmart, which were then able to press their advantage against unions, reasserting the role of the firm as "industrial manor" and workers as "industrial serfs."

Many scholars now see the contours of a fourth stage emerging in the evolution of the corporation. They argue that managerial capitalism has today partly ceded place to institutional capitalism. This term refers to the emergence of a consolidated network of business leadership, concerned not only with decision making within single firms but also with the development of corporate power beyond them. Institutional capitalism is based on the practice of corporations holding stock shares in other firms. In effect, interlocking directorates—linkages among corporations created by individuals who sit on two or more corporate boards—exercise control over much of the corporate landscape (Caiazza et al., 2018). This system reverses the process of increasing managerial control because the large blocks of shares other corporations own dwarf the managers' shareholdings. For example, JPMorgan Chase, one of the world's largest financial services and banking corporations, is itself owned in large part by a half dozen other financial service companies that control nearly a quarter of the company's stock. The three largest individual shareholders —one is the CEO of JPMorgan Chase, and the other two are top managers—together account for only 0.06 percent of the total stock (CNN Business, 2023; Reiff, 2023).

One of the main reasons for the spread of institutional capitalism is the shift in patterns of investment that has occurred since the 1970s. Rather than investing directly by buying shares in a business, individuals now invest in money market, trust, insurance, and pension funds that are controlled by large financial organizations, which in turn invest these grouped savings in industrial corporations.

Finally, some sociologists argue that we have now entered a fifth stage in the development of business corporations—a form of institutional capitalism they see as global capitalism. According to this view, corporations are increasingly stateless: They are giant transnational entities that roam freely around the planet in search of lower costs and higher profits, loyal to no country regardless of where they might be headquartered. The major corporations today are global not only in the sense that they operate transnationally, but also because their shareholders, directors, and top officers are drawn from many countries (see Chapter 9) (Robinson, 2004, 2014, 2019; Sklair, 2000).

# Fordism and Scientific Management (Taylorism)

Alongside these changes in the nature of capitalist economic systems, there has also been a change in the predominant type of industrial organization in capitalist economies. This change involves a shift from mass production in large bureaucratic organizations for a mass consumer market to more flexible forms of production through global networks of suppliers, tailored to more individualized consumer tastes. Because the former emerged with the modern automobile industry, it is sometimes called "Fordism." Fordism, therefore, is the name given to the system of mass production tied to the cultivation of mass markets. Affixing the prefix *post* to *Fordism* (post-Fordism) suggests that Fordism is being replaced by something entirely new, signaling the end of the Fordist era. This view is misleading, since both forms of industrial organization are found throughout the world today, although these new forms are becoming increasingly important, as we shall see.

Writing more than two centuries ago, Adam Smith, one of the founders of modern economics, identified advantages that the division of labor provides in terms of increasing productivity. His most famous work, *The*

*Wealth of Nations* (1776), opens with a description of the division of labor in a pin factory. A person working alone could perhaps make 20 pins per day. If that worker's task was broken down into a number of simple operations, however, 10 workers carrying out specialized jobs in collaboration with one another could collectively produce 48,000 pins per day. The rate of production per worker, in other words, would increase from 20 to 4,800, with each specialist operator producing 240 times more than they could if working alone.

More than a century later, these ideas reached their most developed expression in the writings of Frederick Winslow Taylor, an American management consultant. Taylor's approach to what he called "scientific management" involved the detailed study of industrial processes to break them down into simple operations that could be precisely timed and organized. Taylorism, as scientific management came to be called, was not merely an academic study. It was also a system of production designed to maximize industrial output, and it had a widespread effect not only on the organization of industrial production and technology but also on workplace politics. In particular, Taylor's time and motion studies wrested control over knowledge of the production process from the worker and placed such knowledge firmly in the hands of management, eroding the basis on which craft workers maintained autonomy in their jobs (Braverman, 1974). As such, Taylorism has been widely associated with the de-skilling, degradation, and control of labor. With rapid developments in artificial intelligence and locational tracking, the worker surveillance described by Taylor a century ago has greatly expanded. To take but one example, Amazon regularly tracks its warehouse workers and drivers to maximize their efficient use of time and space, penalizing those who fail to meet Amazon's standards (Greene, 2021; Palmer, 2021). Concerns about the abuse of geospatial surveillance has led the American Association of Geographers to issue *A White Paper on Locational Information and the Public Interest*, a detailed document that raises concerns and suggests legislation and other strategies to protect workers (and the public in general) from abuses (Goodchild et al., 2022).

The industrialist Henry Ford adopted the principles of Taylorism. In 1908, Ford designed his first auto plant in Highland Park, Michigan, to manufacture only one product, the Model T, thereby allowing the introduction of specialized tools and machinery designed for speed, precision, and simplicity of operation. One of Ford's most significant

innovations was the introduction of the assembly line, said to have been inspired by Chicago slaughterhouses in which animals were disassembled section by section on a moving conveyor belt. Each worker on Ford's assembly line was assigned a specialized task, such as fitting the left-side door handles as the car bodies moved along the line. By 1929, when production of the Model T ceased, more than 15 million cars had been assembled.

One of Henry Ford's most significant innovations was the introduction of the assembly line, which allowed for mass production of the Model T.

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Ford was among the first to realize that mass production requires mass markets. He reasoned that if standardized commodities such as the automobile were to be produced on an ever-greater scale, the presence of consumers who were able to buy those commodities must also be ensured. In 1914, Ford took the unprecedented step of unilaterally raising wages at his Dearborn, Michigan, plant to $5 for an eight-hour day—a very generous wage at the time and one that ensured a working-class lifestyle that included owning an automobile. As David Harvey (1990) remarks, "The purpose of the five-dollar, eight-hour day was only in part to secure worker compliance with the discipline required to work the highly productive assembly-line system. It was coincidentally meant to provide workers with sufficient income and leisure time to consume the mass-produced products the corporations were about to turn out in ever vaster quantities." Ford also enlisted the services of a small army of

social workers, who were sent into the homes of workers to educate them in the proper habits of consumption.

*Fordism* is also sometimes used to refer to a historical period in the development of post–World War II capitalism in which mass production was associated with relative stability in labor relations and a high degree of unionization. Under Fordism, firms made long-term commitments to workers, and wages were tightly linked to productivity growth. Collective-bargaining agreements—formal agreements negotiated between firms and unions—provided for rising wages, seniority rights, and benefits in exchange for worker consent to increasingly automated systems of production. The rising wages also helped ensure that there was sufficient demand for the mass-produced commodities. Worker strife was not absent from this system, and the heyday of Fordism—the period from the end of World War II (1945) to the early 1970s, when the American economy was rapidly expanding—was marked by dozens of major strikes and countless lesser ones. Workers in industries large and small walked off the job to demand their share of the growing economic pie. From the Great Strike Wave of 1946, which cut across many industries and utilities, to the automobile workers' strikes of the early 1970s, workers—backed by strong unions—fought hard for rising wages and fair working conditions.

The system is generally understood to have broken down in the 1970s, giving rise to greater "post-Fordist" flexibility, with resulting insecurity in working conditions. The reasons for the declining importance of Fordism are complex and intensely debated. As firms in a variety of industries adopted Fordist production methods, the system encountered certain limitations. Fordism was not suitable for all industries; it could be applied successfully only to industries that produced standardized commodities for large markets. At one time, it looked as though Fordism represented the likely future of industrial production as a whole. This has not proven to be the case. Setting up mechanized production lines is enormously expensive, and once a Fordist system is established, it is quite rigid; to alter a product, for example, requires substantial reinvestment. Fordist production is easy to copy if sufficient funding is available to set up the plant. But firms in countries where labor power is expensive find it difficult to compete with those where wages are cheaper. This was one of the factors originally leading to the rise of the

car industry in Japan (although Japanese wage levels today are no longer low), followed by South Korea, and more recently China.

## Work and Alienation

Fordism and Taylorism involve what some industrial sociologists call low-trust systems. Jobs are set by management and are geared to machines. Those who carry out the work tasks are closely supervised and are allowed little autonomy of action. Where there are many low-trust positions, the level of worker dissatisfaction and absenteeism is high, and industrial conflict is common. High-trust systems are those in which workers are permitted to control the pace and even the content of their work, within overall guidelines. Such systems are usually concentrated at the higher levels of industrial organizations.

Karl Marx was one of the first writers to grasp that the development of modern industry would reduce many people's work to dull, uninteresting tasks, resulting—to use today's language—in low-trust systems. According to Marx, the division of labor alienates human beings from their work. For Marx, alienation refers to feelings of estrangement and even hostility—initially to one's job and eventually to the overall framework of capitalist-industrial production. In Marx's view, workers in a capitalist society lack ownership of the products they make, which they often cannot even afford to buy; they are dehumanized by tedious and demeaning labor processes over which they have no control; and they find themselves in competition with their fellow workers for scarce jobs. Marx saw this situation as counter to human nature, which he believed involved creativity, control over one's activities, and cooperation with others (Appelbaum, 1988; Marx, 1844/2000). In traditional societies, he pointed out, work was often exhausting—peasant farmers sometimes had to toil from dawn to dusk. Yet peasants held a real measure of control over their work, which required considerable knowledge and skill. Many industrial workers, by contrast, have little control over their jobs, contribute only a fraction to the creation of the overall product, and have no influence over how or to whom it is eventually sold. Work thus appears as something alien, a task that the worker must carry out to earn an income but that is in itself unsatisfying.

# Post-Fordism

Globalization, as we saw in the opening to this chapter, has created global supply chains, giving corporations still greater flexibility in terms of hiring workers: Whether a firm is in the business of selling shoes or computers, it can now outsource its production to independently owned factories, called contractors, around the world. If costs go up in one factory—or if workers decide to go on strike for higher wages or better working conditions—the firm can shift its production to another factory, perhaps even in another country. Developments in artificial intelligence, discussed later in this chapter, further increase firm flexibility, to the extent that workers can be replaced by robots, other electronic devices, or software applications.

Since the 1970s, flexible practices have been introduced in a number of spheres. Increasingly, global supply chains involving not only independent contract factories but also group production, problem-solving teams, multitasking, niche marketing, and even the so-called gig economy (involving temporary workers on short-term contracts) are just some of the strategies adopted by companies attempting to restructure themselves under shifting conditions. Some commentators have suggested that, taken collectively, these changes represent a radical departure from the principles of Fordism; they contend that we are now operating in a period that can best be understood as post-Fordism (**Table 14.1**). *Post-Fordism*, a term initially popularized by Michael Piore and Charles Sabel in *The Second Industrial Divide* (1984), describes a new era of capitalist-economic production in which flexibility and innovation are maximized to meet market demands for diverse customized products—albeit often with adverse effects on the workforce.

### Table 14.1 FORDIST VERSUS POST-FORDIST PRODUCTION SYSTEMS

| **FORDISM** | **POST-FORDISM** |
|---|---|
| Bureaucratic/vertical | Flexible/horizontal |
| Mass production | Mass customization |

| FORDISM | POST-FORDISM |
|---|---|
| Most work in-house (local) | Most work outsourced (global) |
| Job security (high wage, long term, full-time, high career advancement) | Job insecurity (low wage, short term, part-time, low career advancement) |

The idea of post-Fordism is somewhat problematic, however. The term is used to refer to a set of overlapping changes that are occurring not only in the realm of work and economic life but also throughout society as a whole. Some writers argue that the tendency toward post-Fordism can be seen in spheres as diverse as party politics, welfare programs, and consumer and lifestyle choices. While observers of late-modern societies often point to many of the same changes, there is no consensus about the precise meaning of post-Fordism or, indeed, whether this term is even the best way of understanding the phenomenon we are witnessing.

Regardless of the confusion surrounding the term *post-Fordism*, several distinctive trends within the world of work have emerged in recent decades that seem to represent a clear departure from earlier Fordist practices. These include the replacement of highly bureaucratic, vertically organized business structures with more flexible, horizontally organized networked approaches; the transition from mass production to mass customization; a shift from in-house production to global outsourcing; and the resulting severe erosion in job security for employees. We now consider each of these in turn. We will consider a fifth trend, the decline of labor union power, later in this chapter.

## Flexible Business Structures

One of the most important changes in worldwide production processes over the past few years has been an increase in the organizational flexibility of many large firms. For much of the twentieth century, the most important business organizations were large manufacturing firms that controlled both the making of goods and their final sales. Giant automobile companies, such as Ford and General Motors (GM), typified this approach. These companies employed tens of thousands of factory workers to make everything from components to the final cars, which were then sold in the manufacturers' showrooms. Such manufacture-dominated production processes were organized as large bureaucracies, often controlled by a single firm.

If General Motors, a highly bureaucratic organization, represented the prototypical corporation of the twentieth century, Walmart may well prove to be symbolic of the twenty-first (Appelbaum, 2019; Lichtenstein, 2006, 2010). Sociologist Gary Hamilton has described a world in which "big buyers"—global retailers—are becoming increasingly dominant in the global economy, not only reshaping business structures but also driving economic development in those regions (such as East Asia) that supply their products (Petrovic & Hamilton, 2006). While both General Motors and Walmart are giant transnational corporations, GM is organized vertically: Most of its production is still done under its own roof, controlled by its own management structure in a highly bureaucratized fashion. GM still designs, produces, and markets the cars that it sells. Control, in other words, is highly centralized.

Walmart is the world's largest corporation, with 2022 revenues of more than $573 billion and 2.2 million employees worldwide (*Fortune*, 2023; Murphy & Contreras, 2022). The world's second-largest company, Amazon, is also a retailer, but one very different from Walmart. Walmart has 11,400 stores in 26 countries to maintain, while Amazon, its fast-growing chief retail competitor, reached $470 billion in sales with virtually no stores to maintain, doing its business online.

Although Walmart is a publicly traded company on the stock market, about half of all its shares are owned by the descendants of founder Sam Walton, making it a family-owned company. Amazon CEO Jeff Bezos, who owns 10 percent of Amazon's stock, is also his company's largest shareholder. Unlike GM, Walmart and Amazon do not design or produce much of what they sell. They both sell products designed by others—Walmart in its stores, Amazon on the web. Those products may bear the

names of well-known brands that design and market them, but their actual manufacture falls to factories around the world. GM exerted a degree of control over its workforce, who labored in GM factories. For giant retailers like Walmart and Amazon, their direct control is over the brands they sell, which must compete on price for Walmart shelf space or on sales for virtual space on Amazon. These brands, in turn, have direct control over their suppliers—the thousands of factories around the globe that compete for their business, typically by cutting costs. The resulting horizontal network of retailers, brands, and factories enables Walmart and Amazon to respond quickly to changes in market conditions, in a way that the more vertically organized GM never could hope to do. If an economic slowdown or a change in buyers' tastes causes a drop in sales for GM, the corporation still must cover the cost of expensive plants and equipment, as well as meet the payroll of hundreds of thousands of employees, from management to the factory floor. For Walmart or Amazon, however, if some brand isn't selling, the brand can respond by canceling orders in some of the contract factories that are its suppliers. Those factories then either switch to other labels or lay off workers.

Retailers and brands control their suppliers through the information technology (IT) and artificial intelligence that have revolutionized the field of supply chain management. Today's world of flexible production involves complex networks of buyers and suppliers: We have seen that a clothing company such as the Gap may have hundreds or even thousands of independently owned factories supplying its stores, while each of those factories may in turn be making clothing for many competing brands. Coordinating these activities requires sophisticated computer technology that enables firms to share relevant data, beginning with the information on the barcode (or, more recently, the QR code, which contains much more data) attached to each product that is scanned at the time of purchase. The most advanced systems enable firms to order just the right number of products to meet demand, shift their orders among different suppliers, and respond "nimbly"—a favored business term—to changing market conditions. Today, even large automobile manufacturers such as GM have moved down the post-Fordist path, outsourcing as much work as possible and using advanced information systems to manage their supply chains.

## Mass Customization

Controlling such far-flung networks of suppliers is only part of the challenge modern businesses face. They must also cater to their customers' changing demands—demands that are shaped, in turn, by a constant flow of advertising in magazines, newspapers, television, radio, and movies. Film franchises such as *The Avengers*, *Star Wars*, *Spiderman,* and *Transformers* are always accompanied by a deluge of toys based on the movie. Although Taylorism and Fordism successfully produced mass products (that were all the same) for mass markets, they were completely unable to produce small orders of goods, let alone goods specifically made for an individual customer. GM or Ford changed the overall design of its cars every couple of years, and the changes were often largely cosmetic: Large tail fins adorned cars in the 1950s, marketed as providing "greater stability on the nation's highways."

Mass customization has changed all this (Pine, 1999). It combines the large-volume production associated with Fordism with the flexibility required to tailor products to consumers' needs. Computer-aided design, coupled with other types of computer-based technology, now permits factories to alter their assembly lines for small-batch production, serving (and creating) particular market niches. Information can be solicited about individual consumers and analyzed to determine the key types of consumer preferences for particular products, which are then manufactured to those specifications. In a modern car factory, several different models can even be built on the same assembly line. The latest development in mass customization is additive manufacturing, or 3D printing, a technology that dates back to the 1980s but became commercially available (and increasingly affordable) only in recent years. This printing process involves the ability, using computerized technology, to add layers of materials that result in physical objects such as fashion accessories, car parts, artificial organs, weapons, and even component parts for the Mars land rover. Nike, Adidas, and Reebok, for example, have developed the ability to scan a customer's foot and print out a custom-designed athletic shoe—and eventually, as 3D printers come down in cost, customers may be able to print out such shoes in their own homes (Matisons, 2015). Nike's Zoom VaporFly Elite Flyprint 3D was designed with the help of Eliud Kipchoge, winner of the 2018 Berlin Marathon. Nike claims that spending $250 on its VaporFly 2 lightweight 3D-tailored construction can reduce runners' energy output by 4 percent, presumably increasing their performance by a comparable amount (Iftikhar, 2018).

Dell was one of the first major computer companies to carry mass customization to a high level, although it is now commonplace for consumers of all major brands to custom design their computer online, charge the purchase to their credit card, and, within a week, receive the custom-made computer at their door. This has turned traditional ways of doing business upside down. Firms used to build a product first, then worry about selling it. Now mass customizers such as Dell sell first and build second. Such a shift has important consequences for industry. The need to hold a stock of parts on hand, a major cost for manufacturers, has been dramatically reduced. In addition, an increasing share of production is outsourced. Thus, the rapid transfer of information between manufacturers and suppliers is essential to the successful implementation of mass customization. Smartphone apps, which give users access to countless different sources of products, services, games, and information, place mass customization on your smartphone. Today, one can use an *app* (which was once a shortened version of "application," now a word in itself) to custom design a computer, find a taco stand or gas station nearby, determine whether a product is environmentally friendly, turn a photo of a best friend's face into an aging zombie, become an influencer on TikTok, or do millions of other things: there are nearly 9 million apps being used globally (Koetsier, 2020).

## Global Outsourcing

Current technology allows factories to respond to specific market and consumer needs. Companies like Dell sell first and build second.

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Changes in industrial production include not only how products are manufactured but also where they are manufactured. In flexible production systems, there is truly a global assembly line: The companies that design and sell products seldom make them in their own factories, instead outsourcing production to factories around the world. As we saw in Chapter 9, none of the 185 million iPhones sold in 2019 (Graham, 2020) were assembled in the United States; with few exceptions, the production of almost all the iPhone's components were done in virtually a United Nations catalogue of countries.

As we learned in the chapter opener, few, if any, industries are as globalized as the industry that makes the clothing and footwear that fill your closet. Almost no major U.S. companies today make their own apparel or footwear; rather, they outsource to independently owned factories that do the work for them. These factories are found in more than 100 different countries and range from tiny sweatshops to giant plants owned by transnational corporations. Most so-called garment manufacturers actually employ no garment workers at all. Instead, they rely on thousands of factories around the world to make their apparel, which they then sell in department stores and other retail outlets. Clothing manufacturers do not own any of these factories and are therefore free to use them or not, depending on their needs. While this system provides the manufacturers with the flexibility previously discussed, it creates great uncertainty both for the factories, which must compete with one another for orders, and for the workers in those factories, who may lose their jobs if their factory loses business (Bonacich & Appelbaum, 2000). Bonacich and Appelbaum (2000) argue that such flexible production, driven by global competition, has resulted in a global "race to the bottom," in which retailers and manufacturers will go anyplace on earth where they can find the lowest wages, the fewest environmental restrictions, and the most lax governmental regulations. This system invites abuses of workers—starvation wages, toxic and unsafe working conditions, and all too often death as a result of factory fires and building collapses (Appelbaum & Lichtenstein, 2016).

## Job Insecurity

Flexible production has produced some benefits for consumers and the economy as a whole, but the effect on workers has not been wholly positive. Though some workers undoubtedly do learn new skills and have less monotonous jobs, the majority find their work lives less secure than before. For many workers inside the United States, the long-term employment, rising wages, career advancement, and health and retirement benefits once associated with a job at a General Motors or Ford plant have become a thing of the past. To keep their jobs, U.S. workers have had to accept pay cuts and reduced benefits packages. And, of course, many have lost their jobs to overseas competition.

# The Informal Economy

Many types of work do not conform to orthodox categories of paid employment; they cannot be classified as either Fordist or post-Fordist. Much of the work done in all societies, for example, is performed outside formal business firms, and indeed, outside the formal economy itself. The term informal economy refers to transactions outside the sphere of regular employment, sometimes involving the exchange of cash for goods and services provided, for which no official records are kept, and which therefore escape government notice. Your child's babysitter might be paid in cash, "off the books," without any receipt being given or details of the job recorded; the same may be true of the person who cleans your house or does your gardening, if you have such services; and it is certainly true of illegal goods and services, which are necessarily paid in cash (or perhaps in cryptocurrency).

In poor countries, a significant part of the national economy consists of such informal work. One study estimates that the informal economy may account for more than half of the employment in sub-Saharan Africa and contribute about a third of the region's GNI (UN Economic Commission for Africa, 2015). The informal economy in the developing world has a high presence of women, involving as many as 60 percent of working women (Alexander, 2019; Mbaye & Benjamin, 2014). The high prevalence of informal economy work in developing countries has both positive and negative effects. Among the former, such work provides employment and earnings, and, in many cases, can make the difference between absolute poverty and subsistence-level survival. While much informal-sector work involves self-employment, in some cases, it also

enables people to form small businesses. On the negative side, because such work is by definition "off the books," the informal sector is unregulated, unreported, unprotected by the state, and prone to abuse. Since informal-sector work is officially unknown to the state, it does not contribute to taxes or pension funds, which deprives the state of revenues (although where governments are corrupt, this may actually be a benefit) (Benjamin, 2014). According to the International Monetary Fund, over the past several decades the informal economy, as a percentage of GNI, has gradually fallen in all regions of the world (Alexander, 2019). In the United States, the informal economy is estimated to add about 7 to 8 percent to the GNI each year —which, given the large size of the American economy, amounted to nearly $1.6 trillion in goods and services exchanged that never appeared in any official government accounts (Medina and Schneider, 2018; World Economics, 2022).

It is estimated that the majority of female workers in developing countries work in the informal economy. Women in Madagascar sell fish on the street.

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The informal economy has given rise to a "dark web," where illegal goods and services, from drugs to prostitution, can now be purchased with a high degree of anonymity. "Darknet markets," such as the Hydra Market, facilitate anonymous illegal transactions using cryptocurrency. Before it was shut down by the U.S. Department of Justice (DOJ) in

2022, Hydra accounted for four-fifths of all such cryptocurrency transactions, totaling some $5.2 billion since 2015. Hydra was an online criminal marketplace that enabled users in mainly Russian-speaking countries to buy and sell illicit goods and services, including illegal drugs, stolen financial information, fraudulent identification documents, and money laundering and mixing services, anonymously and outside the reach of law enforcement. Transactions on Hydra were conducted in cryptocurrency and Hydra's operators charged a commission for every transaction conducted on Hydra (U.S. DOJ, 2022). One study estimated that as of April 2015, there were 15 darknet marketplaces listing over 43,000 illicit drugs (Digital Citizens Alliance, 2015). Illegal drugs constitute a major part of the informal economy in some countries: In Afghanistan, opiate trade brought in an estimated $1–$2 billion in 2019, representing 6 to 11 percent of the country's GNI (UN Office on Drugs and Crime, 2019). There is widespread disagreement over the size of the global drug trade—not surprising, perhaps, given its illicit and secretive nature.

The informal economy includes not only "hidden" cash transactions but also many forms of self-provisioning, which people carry on inside and outside the home. Do-it-yourself activities and household appliances and tools, for instance, provide goods and services that would otherwise have to be purchased. And the informal economy also often includes the labor of possibly millions of undocumented immigrant workers who toil in factories and restaurants or clean houses and do yard work. Such work often goes unreported, which means the wages are often below the legal minimum and workers have no recourse if they are underpaid (or indeed, not paid at all).

Globally, it is estimated that there are nearly 76 million domestic workers; three-quarters are women. Eight out of ten are part of the informal sector, and therefore lack any labor or social protections (International Labour Organization [ILO], 2021). Nearly one in six are migrants in the countries where they work, which means they are especially vulnerable to all forms of economic, physical, and sexual abuse (ILO, 2016a). There is a large demand for domestic workers in the United States, both because in two-person households both members are likely to be working, and because there is an abundant supply of people who are desperate for work (Burnham et al., 2012; Ranoa, 2023). Some 2 million domestic workers play a critical economic role, doing work such

as housecleaning, caring for children, and serving as caregivers for the infirm and elderly (ILO, 2021). Home health care is one of the fastest-growing jobs in the U.S. economy, as aging baby boomers, many with declining health, choose to stay at home rather than move into nursing homes (there are currently 55 million Americans over 70, and 20 million over 80). An estimated 2 million home health care workers, mainly women, earn poverty-level wages performing emotionally stressful and physically demanding work (the 2017 median income for home health care workers was only $16,200). Turnover in this field is understandably high, and some 924,000 new jobs will be needed by 2031 to serve the growing number of elderly who need care (Newman, 2019; PHI National, 2019; U.S. BLS, 2022b).

Most domestic workers are women; most are non-White; and many are immigrants (including many who are undocumented). Because domestic workers are typically socially isolated as well as "off the books," their lack of access to legal protection invites exploitation and abuse: Fully one-quarter of domestic workers report feeling unsafe in their workplaces. Domestic workers have not been silent about their working conditions, however. Along with labor advocates and organizations such as the National Domestic Workers Alliance, domestic workers are now pushing for a Domestic Workers Bill of Rights that would provide them with anti-harassment and anti-discrimination protection. Ten states have already enacted such legislation, but there is as yet none at the federal level (Boris, 2022; Luterman, 2022).

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**CONCEPT CHECKS**

1. **Describe five forms that capitalism has taken.**
2. **What are two key differences between Fordism and post-Fordism?**
3. **Define and provide an example of an informal economy.**

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# Glossary

corporations
: Business firms or companies.

family capitalism
: Capitalistic enterprise owned and administered by entrepreneurial families.

entrepreneur
: The owner/founder of a business firm.

managerial capitalism
: Capitalistic enterprises administered by managerial executives rather than by owners.

welfare capitalism
: The practice by which large corporations protect their employees from the fluctuations of the economy.

institutional capitalism
: Consolidated networks of business leadership in which corporations hold stock shares in one another, resulting in increased concentration of corporate power.

interlocking directorates
: Linkages among corporations created by individuals who sit on two or more corporate boards.

global capitalism
: The current transnational phase of capitalism, characterized by global markets, production, and finance; a transnational capitalist class whose business concerns are global rather than national; and transnational systems of governance (such as the World Trade Organization) that promote global business interests.

Fordism
: The system of production pioneered by Henry Ford, in which the assembly line was introduced.

Taylorism
: A set of ideas, also referred to as *scientific management*, developed by Frederick Winslow Taylor, involving simple, coordinated operations in industry.

low-trust systems
: Organizational or work settings in which people are allowed little responsibility for, or control over, the work task.

high-trust systems
: Organizational or work settings in which individuals are permitted a great deal of autonomy and control over the work task.

alienation
: The sense that our own abilities as human beings are taken over by other entities. The term was originally used by Karl Marx to refer to

the projection of human powers onto gods. Subsequently, he used the term to refer to the loss of workers' control over the nature and products of their labor.

post-Fordism
: The period characterized by the transition from mass industrial production, using Fordist methods, to more flexible forms of production favoring innovation and aimed at meeting market demands for customized products.

flexible production
: A manufacturing system involving a complex network of contract factories that enable both the process of production, and the product itself, to be quickly modified in order to meet changing demand and market conditions.

outsourcing
: A business practice that sends production of materials to factories around the world. The components of one final product often originate from many different countries and then are sent elsewhere to be put together and sold. Factories from different countries must compete with one another to obtain business.

informal economy
: Economic transactions carried on outside the sphere of orthodox paid employment.

# 3 CURRENT RESEARCH ON WORK AND ECONOMIC LIFE

**Recognize the importance of the rise of large corporations; consider particularly the global effect of transnational corporations. Learn about the challenges facing workers today, including growing unemployment, the decline of labor unions, the rise of low-wage work, and the global trading system.**

The changes we have just described affect many aspects of work and economic life. These changes have generally favored the growing power of corporations relative to their workers. We first look at the growth of transnational corporations and how this is reshaping the nature of economic organization in the twenty-first century, before turning to a discussion of workers, unions, and the challenges they face. We conclude the discussion of current research by looking at some forms of industrial conflict that occur when labor and management fail to agree.

## Corporations and Corporate Power

Since the turn of the twentieth century, modern capitalist economies have been more and more influenced by the rise of large business corporations, particularly those in financial services such as banks, stock brokerages, and investment funds. While manufacturing remains important in the U.S. economy, representing about 8 percent of the U.S. workforce and 12 percent of U.S. GNI, the corporations with the largest assets are now banks rather than manufacturers (Gittleman, 2022; U.S. BLS, 2022a).

The world economy is increasingly influenced by the rise of large business corporations. In 2022, the 2,000 largest corporations in the world had total annual revenues of nearly $48 trillion, and assets valued at $234 trillion—up from $186 trillion only a few years earlier. According to one estimate, this represents half the value of all officially measured assets in the world combined. The two largest economic sectors, banking and finance, account for nearly three-fifths of total assets. The largest bank in the world is the Industrial and Commercial

Bank of China, with $5.5 trillion in assets (Murphy & Contreras, 2022). The power of the financial services sector was seen in the financial collapse of 2007–2008, when large financial institutions paid the price for making risky (so-called subprime) loans in housing and other sectors. When this financial bubble collapsed because the loans could not be repaid, it threatened to take down the entire U.S. economy—a crisis that was averted only when the government stepped in and provided bailout loans for major banks and corporations that were deemed "too big to fail" in terms of their widespread economic impact.

Of course, there still exist thousands of smaller firms and enterprises within the American economy. In these companies, the image of the entrepreneur—the boss who owns and runs the firm—is by no means obsolete. The large corporations are a different matter. Ever since Adolf Berle and Gardiner Means published their celebrated study *The Modern Corporation and Private Property* (1932/1982), it has been accepted that those who own most of the largest firms do not actually run them. In theory, large corporations are the property of their shareholders, who have the right to make all important decisions. But Berle and Means argue that because share ownership is so dispersed, actual control has passed into the hands of the managers who run the firms on a day-to-day basis. Ownership of corporations is thus separated from their control.

Whether owners or managers run them, major corporations have extensive power. When one or a handful of firms dominate in a given industry, they often cooperate in setting prices rather than freely competing with one another. Thus, the giant oil companies normally follow one another's lead in the price charged for gasoline. When one firm occupies a commanding position in a given industry, it is said to be in a monopoly position. More common is a situation of oligopoly, in which a small group of giant corporations predominates. In situations of oligopoly, firms are able to more or less dictate the terms on which they buy goods and services from the smaller firms that are their suppliers.

The emergence of the global economy has contributed to a wave of corporate mergers and acquisitions on an unprecedented scale, exceeding $3.6 trillion globally in 2022; 43 percent of the total involved U.S. firms. One of the largest deals was Microsoft's acquisition of Activision Blizzard ($68.7 billion), giving Microsoft ownership of such popular video games as *Overwatch Call of Duty*, *Hearthstone*, and *World of Warcraft*. Broadcom's acquisition of VMware ($61 billion) provided the

chip technology leader with access to virtual reality software. Elon Musk's acquisition of Twitter ($44 billion) raised eyebrows, since Musk's major companies (Tesla, SpaceX) seemed remote from the financially troubled Twitter. Other major acquisitions involved real estate (Prologis's acquisition of Duke Realty for $26 billion), grocery chains (Kroger's purchase of Albertsons for $25 billion), and computer-assisted design (Adobe's purchase of Figma for $20 billion) (Goldfeld et al., 2023). The resulting giants are seen as oligopolies that critics predict will restrict consumer choice and ultimately raise prices.

Chinese firms are also rapidly getting into the mergers and acquisitions game (Shepard, 2016). At first, Chinese state-owned firms were the primary players, buying up energy and commodities companies to power the country's factories: Two state-owned Chinese energy firms—Sinopec (the world's second-largest corporation in 2019, based on revenues) and China National Petroleum (the fourth largest)—had gone on a global shopping spree in 2014, acquiring part or complete ownership of Chesapeake Energy (U.S.), Petrobras Energia (Peru), Apache Corporation (U.S.), ENI East Africa (Mozambique), and the Kashagan oil fields (Kazakhstan) (China.org.cn, 2014). More recently, in 2022 China International Marine Containers (CIMC) planned to purchase Maersk Container Industry, which would have given it a virtual monopoly over global refrigerated shipping. The U.S. Department of Justice, however, intervened to prevent the merger, stating it "would also have consolidated control of over 90% of insulated container box and refrigerated shipping container production worldwide in Chinese state-owned or state-controlled entities" (Chambers, 2022; Interesse, 2022; Salgado, 2022).

A number of factors have contributed to the trend of mergers and acquisitions, including technological advances, which have lowered global transportation and communications costs; a relaxation of regulation of corporate business activities; and new and efficient ways of financing and pooling the large sums of capital needed to conduct a merger or acquisition. One of the primary aims of the recent wave of business consolidations has been to eliminate direct competition and productive overcapacity. Overcapacity is a problem that occurs when businesses produce more goods than the market will consume. Following the logic of supply and demand, overcapacity leads to a decline in the value of the goods produced and to a decline in profits. Consolidation of firms is an attempt to avoid this problem.

## Transnational Corporations

With the intensifying of globalization, most large corporations now operate in an international economic context. When they establish branches in two or more countries, they are referred to as transnational (or multinational) corporations. Swiss researchers identified more than 43,000 transnational corporations networked together across the globe in 2007 (although the study has not been replicated with more recent data, its findings would most likely be similar today). They found that only 147 of these corporations controlled almost 40 percent of the total monetary value of the entire network; 737 firms accounted for 80 percent. The top 50 firms were primarily financial institutions such as Barclays, JPMorgan Chase, and Merrill Lynch, which strongly suggests that the financial services industry has a great deal of power and influence in the global economy (Vitali et al., 2011).

The largest transnationals are gigantic; their wealth outstrips that of many countries (Table 14.2). The scope of these companies' operations is staggering. The combined revenues of the world's 500 largest transnational corporations totaled $37.8 trillion in 2022—an increase of nearly a fifth over the previous year. Walmart alone, the world's largest corporation, had 2022 revenues of more than a half trillion dollars ($573 billion). To give an idea of the magnitude of that number, in 2022, $102 trillion in goods and services was produced by the *entire world* (derived from *Fortune*, 2023; International Monetary Fund, 2023).

The United States is home to the largest number of firms among the top 500 transnational corporations, although the share of American-based companies has fallen sharply in recent years as the number of transnational corporations based in other countries—especially Asian countries such as China and Japan—has increased. In 2005, the United States had 176 companies in the Global 500; in 2022, the number had declined to 124. China has moved in the opposite direction: It had only 16 companies in the Global 500 in 2005, and none among the top 10. Today, it boasts 136, including 3 among the top 10. Revenues from companies in Greater China (including Taiwan) now exceed revenues from U.S. firms, accounting for nearly a third of the total (*Fortune*, 2023).

Transnational corporations have assumed an increasingly important place in the world economy over this century. They are of key importance in the international division of labor—the specialization in producing goods for the world market that divides regions into zones of industrial or agricultural production or high- or low-skilled labor (Fröbel et al., 1979; McMichael, 1996). Just as national economies have become increasingly concentrated—dominated by a limited number of very large companies—so has the world economy. In the case of the United States and several of the other leading industrialized countries, the firms that dominate nationally also have a wide-ranging international presence. Many sectors of world production (such as agribusiness) are oligopolies. Over the past two or three decades, international oligopolies have developed in the automobile, microprocessor, and electronics industries and in the production of some other goods marketed worldwide.

**Table 14.2CORPORATE GLOBALIZATION: THE WORLD'S 50 LARGEST ECONOMIES (IN BILLIONS OF DOLLARS) (2018)***

| | | | | | |
|---|---|---|---|---|---|
| 1 | United States | $20,494.1 | 26 | Thailand | $505.0 |
| 2 | China | $13,608.2 | 27 | Austria | $455.7 |
| 3 | Japan | $4,970.9 | 28 | Norway | $434.8 |
| 4 | Germany | $3,996.8 | 29 | **Sinopec** | **$414.6** |
| 5 | United Kingdom | $2,825.2 | 30 | United Arab Emirates | $414.2 |
| 6 | France | $2,777.5 | 31 | Nigeria | $397.3 |
| 7 | India | $2,726.3 | 32 | **Royal Dutch Shell** | **$396.6** |

| | | | | | |
|---|---|---|---|---|---|
| 8 | Italy | $2,073.9 | 33 | **China National Petroleum** | **$393.0** |
| 9 | Brazil | $1,868.6 | 34 | **State Grid** | **$387.1** |
| 10 | Canada | $1,709.3 | 35 | Ireland | $375.9 |
| 11 | Russian Federation | $1,657.6 | 36 | Israel | $369.7 |
| 12 | Korea, Rep. | $1,619.4 | 37 | South Africa | $366.3 |
| 13 | Australia | $1,432.2 | 38 | Singapore | $364.2 |
| 14 | Spain | $1,426.2 | 39 | Hong Kong SAR, China | $363.0 |
| 15 | Mexico | $1,223.8 | 40 | **Saudi Aramco** | **$355.9** |
| 16 | Indonesia | $1,042.2 | 41 | Malaysia | $354.3 |
| 17 | Netherlands | $912.9 | 42 | **BP (British Petroleum)** | **$303.7** |
| 18 | Saudi Arabia | $782.5 | 43 | **Exxon Mobil** | **$290.2** |

| | | | | | |
|---|---|---|---|---|---|
| 19 | Turkey | $766.5 | 44 | **Volkswagen** | **$278.3** |
| 20 | Switzerland | $705.5 | 45 | **Toyota Motor** | **$272.6** |
| 21 | Poland | $585.8 | 46 | **Apple** | **$265.6** |
| 22 | Sweden | $551.0 | 47 | **Berkshire Hathaway** | **$247.8** |
| 23 | Belgium | $531.8 | 48 | **Amazon** | **$232.9** |
| 24 | Argentina | $518.5 | 49 | **United Health Group** | **$226.2** |
| 25 | **Walmart** | **$514.4** | 50 | **Samsung Electronics** | **$221.6** |

*The European Union (EU) is actually the world's second-largest economy, with combined GNI totaling $18.7 trillion in comparison with the United States' $20.6 trillion. In this table, however, we consider the European countries separately, since the EU does not function entirely as a single economy. The world economy as a whole has a combined GNI of $85.8 trillion. By this measure (GNI), the United States, the European Union, and China account for more than three-fifths (62 percent) of total world GNI.

Sources: *Fortune*, 2019; World Bank, 2020g.

A major force behind globalization, container ships like Evergreen's *Ever Ace*, pictured here, allow for the rapid movement of goods around the world.

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The reach of the transnationals since the mid-1970s would not have been possible without advances in transportation and communications. Although we often think we live in a virtual world, where goods and services appear magically with the click of a mouse, it is important to remember that most involve actual people somewhere in the world who make the products, at least if they have not yet been replaced by bots! Those goods must somehow get from a factory around the world to an Amazon warehouse, a Walmart Supercenter, or a local mom-and-pop store. Air travel now allows goods to move around the world at a speed that would have seemed inconceivable even 60 years ago. But most importantly, technological innovations allowing containerization have permitted the rapid movement and distribution of bulk goods around the world. The containers, which are typically 40 feet in length and may carry as much as 30 tons of goods, are loaded at the factory (for example, in China) where the goods are produced. They are then lifted onto the beds of trains or 18-wheeler trucks and hauled to a modern container port (for example, Shanghai, the world's busiest container port), where they are stacked like Legos by electronically controlled robot cranes, until they are ready to be loaded onto giant container ships. The world's largest

container ship, the *Ever Ace*, was launched in July 2021. It is a quarter mile long, slightly more than 200 feet wide, and approximately 20 stories high and can carry 24,000 20-foot containers—enough to stretch nearly 90 miles if placed end to end. This ship is one of 13 being built by Korean and Chinese companies for a Taiwanese shipping company, the Evergreen Corporation (Lena, 2023). It might take a little over two weeks to cross the Pacific from Shanghai to Los Angeles, where the containers would be unloaded, placed on a truck or train, and hauled to the Los Angeles region's so-called inland empire west of Los Angeles, once described by sociologist Edna Bonacich as containing "the largest concentration of warehouses and distribution centers on the planet" (Allen, 2010). From there they are sent, by truck or rail, to retail outlets throughout the United States. The overall process—from factory to point of sale—is called intermodal transport; it involves moving huge containers around the world by means of a combination of truck, rail, ship, and sometimes air.

Global corporations have become the first organizations able to plan on a truly world scale. Apple, McDonald's, and Coca-Cola ads reach billions. A few companies with developed global networks are able to shape the commercial activities of diverse nations. One useful way to think about this is through a typology developed a quarter century ago by Richard Barnet and John Cavanagh (1994). In their view, there are four webs of interconnecting commercial activity in the new world economy. These are what they call the global cultural bazaar, the global shopping mall, the global workplace, and the global financial network.

Bringing in more than $2.81 billion in worldwide ticket sales, *Avengers: Endgame* became one of the highest-grossing films of all time, due in large part to its strong international appeal: The film grossed nearly $2 billion internationally, especially in China, where it broke all records for its first five days ($331 million).

The global cultural bazaar is the newest of the four but already the most extensive. Global images and global dreams are diffused through movies, TV programs, music, videos, games, toys, and T-shirts, sold on a worldwide basis. All over the earth, even in the poorest developing countries, people use the same electronic devices to see or listen to the same commercially produced songs and shows. When Apple releases a new iPhone, crowds form at Apple stores from Beijing to Baltimore.

The global shopping mall is a "planetary supermarket with a dazzling spread of things to eat, drink, wear and enjoy," according to Barnet and Cavanagh. It is more exclusive than the global cultural bazaar because the poor do not have the resources to participate—they have the status only of window shoppers. Of the 8 billion people who make up the world's population, more than half lack the cash or credit to purchase significant amounts of consumer goods.

The third global web, the global workplace, is the increasingly complex global division of labor that affects all of us. It consists of the massive array of offices, factories, restaurants, and millions of other places where goods are produced and consumed or information is exchanged.

This web is closely bound up with the fourth web—the global financial network, which it fuels and is financed by. The global financial network consists of billions of bits of financial information stored in computers and portrayed on computer screens. It entails almost endless currency exchanges, credit card transactions, insurance plans, and buying and selling of stocks and shares.

## The Twenty-First-Century Corporation: Different From Its Twentieth-Century Counterpart

There are considerable differences between the large corporation of the early twenty-first century and its mid-twentieth-century counterpart. Many of the names are the same—General Electric, General Motors, Ford, IBM, AT&T—but these have been joined by other giant firms, largely or completely unknown in the 1950s, such as Walmart, Amazon, Tesla, Microsoft, Apple, Google, Meta, and Intel. They all wield great power, and their top executives typically still inhabit the large buildings that dominate so many cities.

But below the surface similarities between today and a half century ago, some profound transformations have taken place. The origin of these transformations lies in a process we have encountered often in this book: globalization. Since the 1950s, the giant corporations have become more and more caught up in global competition; as a result, both their internal composition and, in a way, their very nature have altered. Nearly 30 years ago, former U.S. labor secretary (now University of California–Berkeley professor of public policy) Robert Reich (1991) wrote:

> Underneath, all is changing. America's core corporation no longer plans and implements the production of a large volume of goods and services; it no longer invests in a vast array of factories, machinery, laboratories, inventories, and other tangible assets; it no longer employs armies of production workers and middle-level managers. . . . In fact, the core corporation is no longer even American. It is, increasingly, a façade, behind which teems an array of decentralized groups and subgroups continuously contracting with similarly diffuse working units all over the world.

Today the global supply chains of the corporations that design, make, and sell products link the world in a web of production networks that now reach every place on the planet. For better or worse, the personal lives and work lives of all of us—indeed, of all people everywhere—are increasingly intertwined. Nelson Lichtenstein (2006), a labor historian who spent many years studying Walmart, has characterized this as a shift from General Motors to Walmart, which he describes as "a template for twenty-first-century capitalism." Walmart, Lichtenstein points out, provides us with a steady stream of low-cost products, making it possible for millions of Americans of limited means to feed and clothe their families. Walmart thus permits many Americans to enjoy a lifestyle of consumption that would otherwise not be possible. The giant retailer also provides jobs, although most are not nearly as well paying as the millions of manufacturing jobs that have been lost in recent years. GM workers, Lichtenstein notes, had lifetime, unionized jobs that were often the best manufacturing jobs to be found. Walmart, by way of contrast, has an antipathy to organized labor that has made it all but impossible to unionize Walmart workers. The result is that its employees have fewer working hours, widespread job insecurity, and lower pay. Such working conditions have resulted in high levels of worker dissatisfaction, reflected in yearly worker turnover rates as high as 70 percent (Bahn, 2022).

Perhaps in response to these conditions, John Furner, president and CEO of Walmart U.S., announced in January 2023 that the average hourly pay for associates would increase to more than $17.50 (Ap, 2023). It was also reported that 340,000 employees (a fifth of Walmart's U.S. workforce) would get raises and the overall hourly minimum wage would increase from $12 to $14 (Ap, 2023; Wile, 2023).

The one place where jobs have been gained, and in large numbers, is in the emerging economies of the developing world. In the past manufacturing boomed in China, "the world's factory," where hundreds of millions labored, many under harsh conditions, in millions of factories that turned out everything from running shoes to flat-panel TVs to smartphones (China Labor Watch, 2019). China's factories continue to provide many of the goods that are sold in Walmart's thousands of U.S. stores. China, however, is now becoming a global economic power, with its economy focused on developing science and technology as a driver for high-tech (and higher-paid) industries rather than low-cost manufacturing (Appelbaum et al., 2018). As a result, low-wage manufacturing has been moving to lower-wage countries in Asia and Africa. Yet despite these economic changes, the U.S. and Chinese economies remain tightly linked together.

Some corporations remain strongly bureaucratic and centered in the United States. However, most are no longer so clearly located anywhere. The old transnational corporation used to work mainly from its American headquarters, from where its overseas production plants and subsidiaries were controlled. Now, with the transformation of space and time noted earlier (Chapter 5), groups situated in any region of the world are able, via telecommunications and computer, to work with others. Nations still try to influence the flow of information, resources, and money across their borders, but modern communication technologies make this more and more difficult, if not impossible. Knowledge and finances can be transferred across the world as electronic blips moving at nearly the speed of light.

Even the production of the technology that makes the global activities of transnational corporations possible is spread out over the globe. With revenues of $71 billion in 2018, the California-based computer chip manufacturer Intel dominates the global personal computer microchip industry, boasting a global workforce of 131,900 employees, slightly more than half of them outside the United States. Its six wafer-fabrication

plants (so-called fabs) and four assembly-test facilities are found in the United States, China, Ireland, Israel, Malaysia, Costa Rica, and Vietnam, although its most advanced facilities—the ones working with the smallest chips—are in the United States and Israel (Intel, 2019, 2023). Intel has long been interested in China, where it has been operating laboratories, manufacturing facilities, and testing facilities for more than two decades. Its chip fabrication plant in Dalian, China, was the first such plant the company has located in an emerging economy. The reason China was selected? Not low labor costs (chip fabrication depends on expensive equipment rather than cheap labor), but rather China's growing supply of talented engineers, along with generous financial incentives provided by the Chinese government (Appelbaum et al., 2018; Parker & Appelbaum, 2012). China's advances in semiconductor technology, reflected in its efforts to develop its own, homegrown, government-supported semiconductor industry, are now viewed by Intel as a serious competitive challenge (Intel, 2023). China's move from assembling chips for Intel and other firms to designing and making chips for its own firms is now viewed in the United States with bipartisan concern. China is now seen as a growing economic rival and even a national security threat; U.S. policy makers are looking for ways to "uncouple" the two economies (White House, 2022b). Even the continued existence of TikTok, which is owned by the Chinese company ByteDance, is uncertain. Whether "uncoupling" can succeed without serious disruption to the U.S. economy (and indeed the world economy) remains to be seen.

# Workers and Their Challenges

The idea of work is actually a complex one. All of us work in many ways besides in paid employment. Cleaning the house, planting a garden, and going shopping are plainly all work. But for two centuries or more, Western society has been built around the central importance of paid work. The experience of unemployment—being unable to find a job when one wants it—is still a largely negative one. Unemployment clearly brings with it unfortunate effects, including, sometimes, falling into poverty.

An individual's quality of life depends on their position in the labor market. Arguably this is truer in the United States than in any other comparably developed economy. Americans spend more time at work

than do citizens of other advanced industrial countries. U.S. living standards also reflect income and employment-related benefits more directly than do living standards in other comparably developed countries where governments universally guarantee paid vacation, job training, and health insurance. There is also more variability in terms of pay and work conditions in the U.S. labor market than elsewhere. Yet, in spite of the overwhelming importance of the labor market for the life conditions of working Americans, there has been relatively little investigation of how workers view the framework through which the U.S. labor market is governed.

For this reason, Richard Freeman of Harvard University and Joel Rogers of the University of Wisconsin set out to find out what workers want in regard to the conditions under which they labor. A quarter century ago Freeman and Rogers (1999) designed the Worker Representation and Participation Survey (WRPS) to canvas workers systematically in a wide variety of professions for their opinions on their employment and how their workplaces could be improved. Freeman and Rogers's findings are based on a national telephone survey of 2,400 workers in private-sector establishments that employ 25 or more people. They excluded top managers, the self-employed, owners of firms or their relatives, public-sector workers, and employees in small firms. Overall, the population from which survey respondents were selected covers approximately 75 percent of all private-sector workers. The findings range across a wide variety of aspects of people's work lives, including causes of worker dissatisfaction, attitudes toward unionization, views of management, and worker knowledge of protective labor legislation. In-depth, follow-up interviews were conducted with 801 workers, who were asked about their views of alternative institutional designs for American workplaces.

The overwhelming finding of Freeman and Rogers's study is that what workers want is more influence at work. American workers believe that if they had more say over how production is carried out, not only would they enjoy work more, but also their firms would be more competitive, and problems would be solved more effectively. Furthermore, influence is associated with a wide range of attitudes about work: Workers satisfied with their degree of influence report that they enjoy going to work, grade employee-management relations as excellent, and trust their employers. In contrast, workers who are dissatisfied with their degree of influence

tend to dislike going to work, report poor relations with management, and distrust their employers.

One of the most surprising findings of the WRPS concerns the kind of institutional arrangement workers consider ideal for achieving greater say. Contrary to what Freeman and Rogers expected, workers prefer an organization run jointly by workers and management to one run by employees alone. Workers were also asked to choose between two hypothetical employee organizations, “one that management cooperated with in discussing issues, but had no power to make decisions,” and “one that had more power, but management opposed.” Sixty-three percent of all employees chose the former organization, whereas only 22 percent stated that they would prefer the latter. These results—in which workers effectively indicated that they would prefer weaker to stronger organizations, in spite of the fact that they also reported wanting more say at work—make sense in light of another question on Freeman and Rogers’s survey. When asked if they thought an organization could be effective without managerial support, nearly three-quarters (73 percent) of all respondents indicated that they believed an employee organization could function only with management cooperation.

## Industrial Conflict

There have long been conflicts between workers and those who have economic and political authority over them. Riots against conscription and high taxes and food riots at periods of harvest failure were common in urban areas of Europe in the eighteenth century. These “premodern” forms of labor conflict continued up until not much more than a century ago in some countries. For example, there were food riots in several large Italian towns in 1868 (Geary, 1981). Such traditional forms of confrontation were not just sporadic, irrational outbursts of violence: The threat or use of violence had the effect of lowering the price of grain and other essential foodstuffs (Booth, 1977; Rudé, 1964; Thompson, 1971).

Industrial conflict between workers and employers at first tended to follow these older patterns. In situations of confrontation, workers would quite often leave their places of employment and form crowds in the streets; they would make their grievances known through their unruly behavior or by engaging in acts of violence against the authorities. Workers in some parts of France in the late nineteenth century would

threaten disliked employers with hanging (Holton, 1978). Use of the strike as a weapon, today commonly associated with organized bargaining between workers and management, developed only slowly and sporadically.

**Strikes** A strike is a temporary stoppage of work by a group of employees to express a grievance or enforce a demand. All the components of this definition are important in separating strikes from other forms of opposition and conflict. A strike is temporary because workers intend to return to the same job with the same employer; when workers quit altogether, the term *strike* is not appropriate. As a stoppage of work, a strike is distinguishable from an overtime ban or "slowdown." A group of workers has to be involved, because a strike is a collective action, not the response of one individual worker. That those involved are employees serves to separate strikes from protests that tenants or students may conduct. Finally, a strike involves seeking to make known a grievance or to press a demand; workers who miss work to go to a ball game could not be said to be on strike.

Workers choose to go on strike for many specific reasons. For much of the twentieth century, U.S. workers typically went on strike to secure higher wages, better hours, safer working conditions, and security of employment, and occasionally to protest against technological changes that would make their work duller or lead to layoffs. In all these circumstances, the strike is essentially a mechanism of power: a weapon of people who are relatively powerless in the workplace and whose working lives are affected by managerial decisions over which they have little or no control. It is usually a weapon of last resort, to be used when other negotiations have failed, because workers on strike either receive no income or depend on union funds, which might be limited.

Fast-food workers protest outside a McDonald's restaurant in Richmond, Virginia, as part of a nationwide strike calling for a higher minimum wage.

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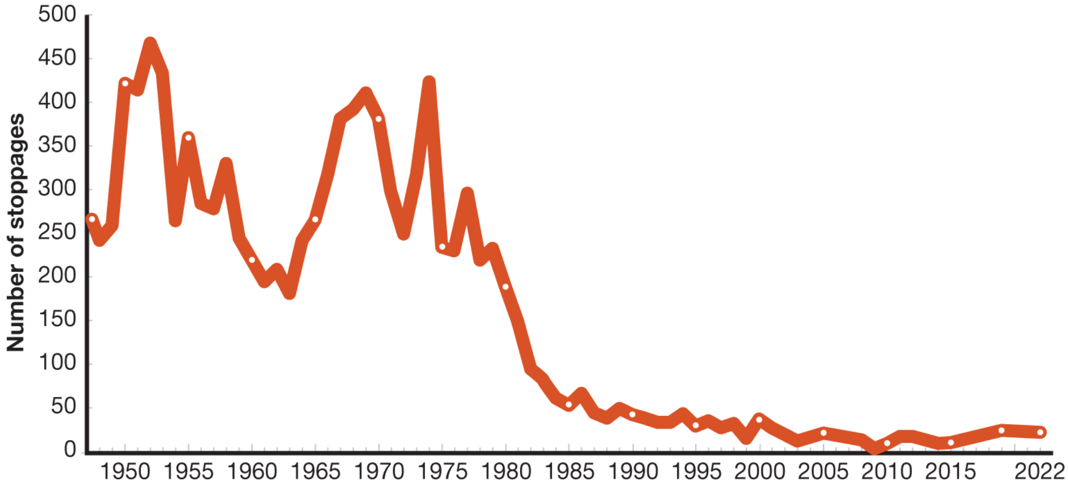
Throughout much of the latter half of the twentieth century, at least in the automobile, steel, and other industries where labor unions were strong, strikes were usually successful. An expanding economy, coupled with well-organized labor militancy, ensured that workers would share in economic growth. During the past quarter century, however, globalization has eroded many of these gains. Competition with low-wage labor elsewhere in the world has resulted in factory closures and layoffs, undermining the effectiveness of strikes and other militant forms of labor action. As Figure 14.1 shows, the number of strikes peaked in the early 1950s: There were 470 strikes in 1952, involving 2.7 million workers. The number of strikes then declined through the early 1960s, peaked once again in the late 1960s, and then generally plummeted. Today, strikes are increasingly rare, although recent years have seen a bit of an upturn. In 2016, there were only 15 strikes with a thousand or more workers, involving a total of 99,000 workers; six years later, the number of strikes had increased to 26, involving 127,000 workers (U.S. BLS, 2017b, 2019d, 2023a). Workers in many industries have had to accept pay cuts in the hope of keeping their jobs, and as we will discuss later, labor union membership has declined significantly, although we will also

discuss what appears to be a recent resurgence in labor activism and unionization.

**Lockouts and "Work to Rule"** Strikes represent only one aspect or type of conflict in which workers and management may become involved. Other closely related expressions of organized conflict are lockouts, in which the employers, rather than the workers, bring about a stoppage of work to force workers to accept a particular contract. "Work to rule" is a form of organized labor action in which workers do the minimum work that is legally required of them, carefully following health, safety, and other regulations. Work to rule usually results in costly slowdowns for the firm because workers routinely exceed the requirements of their contracts and often may even violate health, safety, and wage-and-hour regulations to get the job done. Work to rule is typically done in situations where strikes may be illegal, such as among teachers, whose contracts often forbid strikes. Less organized expressions of conflict may include high labor turnover, absenteeism, and interference with production machinery.

Figure 14.1

**WORK STOPPAGES INVOLVING 1,000 WORKERS OR MORE, 1947–2022**




Source: U.S. BLS, 2023a.

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## Unequal Pay

There are significant differences in how people are compensated for their work throughout the U.S. economy. As we noted in Chapter 8, in 2020 the CEOs of the 350 largest publicly owned U.S. firms earned, on average, $24.2 million, when their total compensation (salaries and stock options) is taken into account. This works out to 351 times the average worker compensation in these industries of $68,400. Fifty years ago, they earned only 21 times as much as the average workers (Mishel & Kandra, 2021). While it can be difficult to make comparisons between countries, the gap is far higher in the United States than it is in other advanced industrial economies (Kotnik et al., 2018; Statista, 2018). While there are many reasons for this, one is that workers have more power in many other countries: Germany, for example, has a policy of “co-determination,” including worker representation on corporate boards (Derousseau, 2014; Fox, 2018).

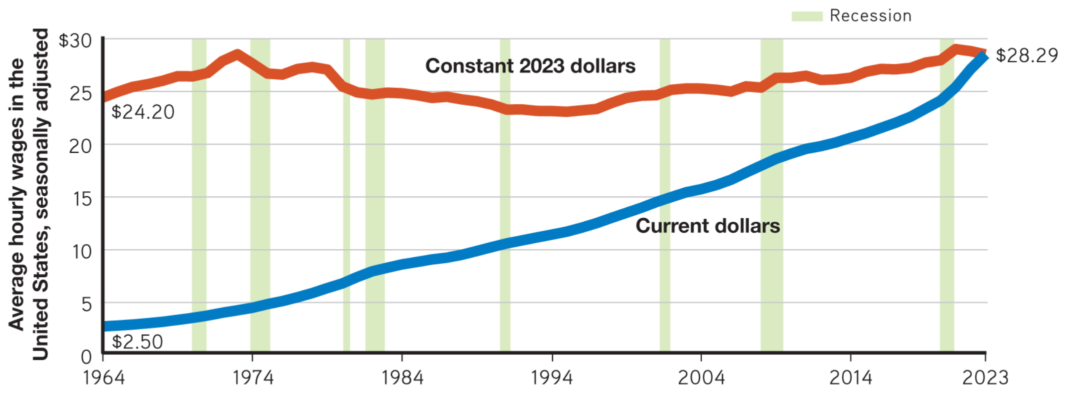
CEO-worker pay gaps notwithstanding, aren’t U.S. workers doing much better than they were a half century ago and sharing in a long period of economic growth? In 1964, private-sector workers (excluding managers) on average made only $2.50 an hour; in January 2023, their hourly earnings had grown elevenfold, to $28.26 (U.S. BLS, 2023g). These seeming gains mask the fact that wages have barely kept pace with inflation: $2.50 in 1964 had the same purchasing power as $24.20 today—meaning that after taking inflation into account, average wages today are only 17 percent higher than they were a half century ago (see Figure 14.2). Significantly, the wage gains that have occurred have gone mainly to the top wage earners: According to one study, since the year 2000 the lowest tenth of wage earners have seen an increase of only 3 percent in real (inflation-adjusted) terms, while the top tenth have seen an increase of 16 percent (DeSilver, 2018a).

There are also significant wage differences by race, ethnicity, and gender. For full-time workers, the gender wage gap has declined significantly over the past 40 years. In 1979, the annual earnings of women who worked full-time were only 65 percent of the earnings of their male counterparts; today, women who work full-time earn roughly 82 percent of what men earn. This is a major improvement, reflecting years of women’s struggle for equal pay. Yet it does not tell the whole story. Far fewer women work full-time year-round (63.0 percent) compared with men (75.4 percent), both because women are more likely to work in occupations characterized by part-time work, and because women are

more likely than men to take time off—whether it be a few weeks, a month, or a year or more—for child-rearing and other forms of caregiving (Hegewisch, 2018). One study looked at total earnings, by gender, for all men and women who had worked at least one year between 2001 and 2015. While nearly three out of five men worked persistently full-time for all 15 years, only slightly more than one out of four women did so. These differences had a striking impact on labor market outcomes: The study found that women earned less than half (49 percent) than men did over the 15-year period (Rose & Hartmann, 2018).

Figure 14.2

**AMERICANS' PAYCHECKS, 1964–2023**




Source: DeSilver, 2018a; U.S. BLS, 2023g; U.S. DOL, 2023.

Racial and ethnic wage differences also persist, with only small improvements over time. In 2018, the median weekly earnings for Black women were 75.5 percent of those of White women; Hispanic/Latina women earned 80.0 percent of what White women earned. Among men, the differences were slightly larger: Relative to White men, Black men earned 73.4 percent; Hispanic/Latino men, 71.9 percent (Hegewisch & Hartmann, 2019). While racial and ethnic earnings gaps have narrowed slightly for Black and Hispanic/Latina women over the past several decades, they have remained largely unchanged for Hispanic/Latino men (Patten, 2016).

The reasons for these persistent earnings gaps are much debated by sociologists and labor market economists. Some research has found that minority wage earners typically have fewer years of formal education,

work in lower-paying occupations, and often have less consistent workforce experience (Blau & Kahn, 2016; Fryer, 2010; Grodsky & Pager, 2001). Discrimination also plays a role: One survey of nearly 3,800 adults found that 62 percent of Black respondents said Blacks were treated less fairly than Whites in the workplace, and 70 percent felt that racial discrimination made it harder for Blacks to get ahead. White respondents had a very different perception of these issues: Only 22 percent believed that Blacks were treated less fairly than Whites at work, and 36 percent felt racial discrimination to be an impediment for Blacks (Patten, 2016).

## Unemployment

Rates of unemployment fluctuated considerably over the course of the twentieth century. In Western countries, unemployment reached a peak during the Great Depression in the early 1930s, when as many as a quarter of the U.S. labor force was out of work. Economist John Maynard Keynes, who strongly influenced public policy in Europe and the United States during the post–World War II period, believed that unemployment results from consumers' lack of sufficient resources to buy goods. Governments can intervene to increase the level of demand in an economy, for example by investing in public work projects or cutting income taxes (both put more money into the economy), leading to the creation of new jobs; the newly employed then have the income with which to buy more goods, thus creating yet more jobs for people who produce them (and, according to Keynes, paying off the government spending that was needed to stimulate economic growth). State management of economic life, most people came to believe, meant that high rates of unemployment were a thing of the past. Commitment to full employment became part of government policy in virtually all Western societies. Until the 1970s, these policies seemed successful, and economic growth was more or less continuous.

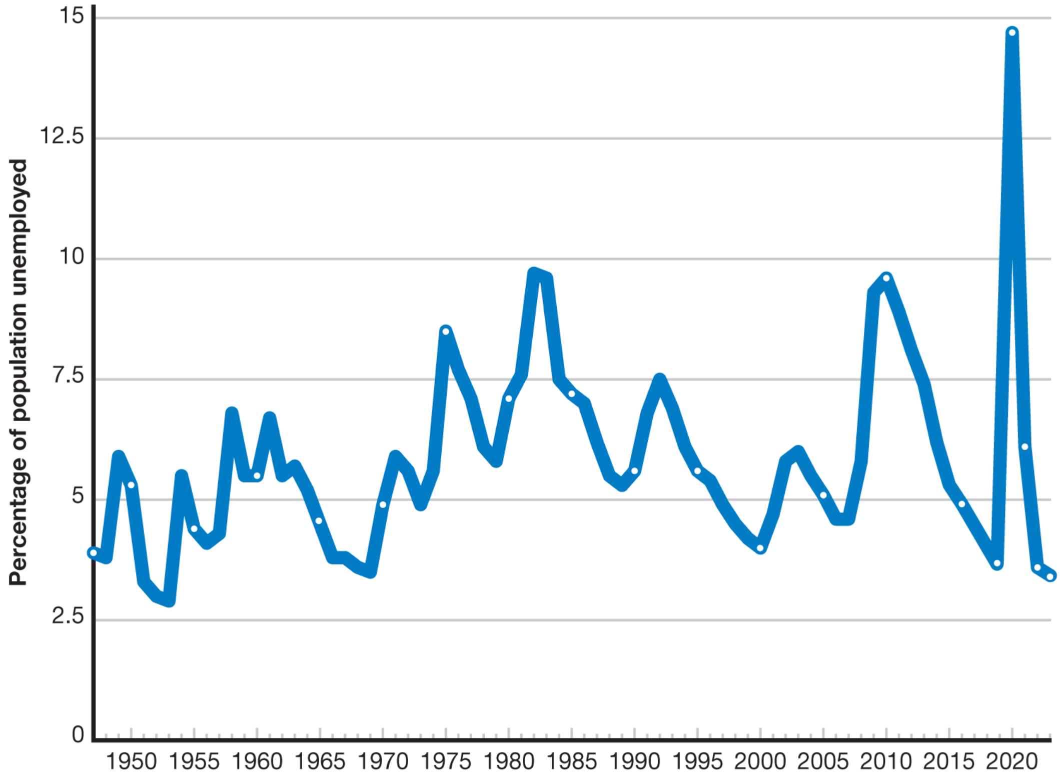
During the 1970s and 1980s, however, Keynesianism was largely abandoned. In the face of economic globalization, governments lost the capability to control economic life as they once did. At the same time, there was a growing belief, particularly among economists, that the "free market" by itself, rather than the government, was best equipped to ensure economic prosperity. These ideas were especially appealing to conservative politicians, initially in the United States and Britain in the

1980s and, to a lesser extent, in other Western industrialized economies. During the same period, unemployment rates increased in many countries.

In the United States, unemployment rates have fluctuated greatly since World War II. Despite some ups and downs, the rate of unemployment averaged under 5 percent during the 1950s and 1960s, falling as low as 2.5 percent during the postwar boom years of the early 1950s. It jumped to more than 7 percent during the 1980s, dropped to slightly under 6 percent during the 1990s and the first decade of the twentieth century, and then peaked at nearly 10 percent during the depths of the recession years of 1982–1983 and 2009–2010. During the Covid-19 pandemic, unemployment reached nearly 15 percent in April 2020, but thanks in large part to the government stimulus package, by the end of 2022 it had dropped to 6.7 percent, and by February 2023 it was at a historic low of 3.6 percent (U.S. BLS, 2023d) (see Figure 14.3).

Figure 14.3

**UNEMPLOYMENT RATE IN THE UNITED STATES, 1947–2023**




Source: U.S. BLS, 2023d.

Unemployment rates among Blacks, Hispanics, and Latinos are significantly higher than those among Whites. During the 10-year period of 2009–2019, which spanned the 2007–2009 economic recession and subsequent recovery, unemployment averaged 5.9 percent for Whites, 11.4 percent for Blacks, and 8.3 percent for Hispanics and Latinos (U.S. BLS, 2019b). While recessions affect everyone, minorities are hardest hit. In July 2009, at the height of the Great Recession, 15 percent of Blacks and 18 percent of Hispanics and Latinos were out of work, compared with 13 percent of Whites. Similar disparities were seen during the initial months of the Covid-9 recession, when 17 percent of Blacks and 13 percent of Hispanics and Latinos were out of work, compared with 9 percent of Whites. While today overall unemployment rates are at historic lows, some differences persist by race and ethnicity. By the end of 2022, unemployment among Whites had dropped to 2.9 percent, among Blacks to 5.5 percent, and among Hispanics and Latinos to 3.9 percent (Couch et al., 2023; U.S. BLS, 2023e). Structural and institutional discrimination, from differences in educational and training opportunities to outright discrimination when it comes to hiring, account for such labor market differences (see Chapter 11).

## After Struggling to Be Effective, Are Labor Unions Rebounding?

In every democratic country in the world, labor unions provide workers with a voice both at work and in politics. Workers began to organize unions in the early 1800s as capitalists built factories to manufacture goods such as clothing, cigars, furniture, and other products more cheaply. To make profits, they paid workers subsistence wages and required that they work six or even seven days a week. In most countries, workers formed political parties to gain influence and get the right to vote. Workers came to realize that while they had virtually no power as individuals, they did have power through collective organization. An employer can do without the labor of any particular worker but not without that of all or most of the workers in a factory or plant. Unions originally were mainly “defensive” organizations, providing the means whereby workers could counter the overwhelming power that employers wielded over their lives.

Unions' influence helped enact laws over wages, hours, workplace safety, and other working conditions. When political leaders and large employers fought those reforms, workers would sometimes go on strike. Usually the police and courts—at the behest of the businesses, which had more political power than the workers did—sided with employers. They often jailed and sometimes killed striking workers. But eventually, in Western Europe, Australia, Mexico, Canada, the United States, and other countries, unions successfully pushed for laws that provided more funding for schools, eight-hour days, the minimum wage, better health care, unemployment and disability insurance, and other pro-worker reforms.

The height of workers' influence occurred after the second World War, when pro-union political parties in many industrial countries dominated the political landscape; 1950 to 1980 was a period of steady growth in union density—the proportion of workers represented by labor unions. Countries that reached the highest levels of union density—Belgium, Denmark, Finland, and Sweden, with more than 80 percent of all workers belonging to labor unions in 1985—had three features in common (Western, 1997). First, strong working-class political parties created favorable conditions for labor organizing. Second, bargaining between firms and labor unions was coordinated at the national level rather than occurring separately in different industries, or at the local level. Third, unions, rather than the government, directly administered unemployment insurance, ensuring that workers who lost their jobs did not leave the labor movement. Countries lacking one or more of these factors had lower rates of union density, ranging between two-fifths and two-thirds of the working population.

The United States has had the weakest labor movement among democratic countries. Some argue that a strong culture of individualism makes U.S. workers less interested in unions, since they believe that they can rise into the middle or even upper class on their own. But, in fact, polls have consistently found that American workers—not only blue-collar factory workers but also office workers, teachers, nurses, and others—want a stronger voice at work and in politics. A 2022 Gallup Poll found that 71 percent of Americans now support unions—the highest rate since 1965 (McCarthy, 2022). Union density has been kept relatively low partly because U.S. corporations are much more hostile to unions than their counterparts in many other countries are, and use their political

influence to thwart union organizing. Another factor is that the U.S. presidential electoral system results in two dominant parties, preventing the formation of effective pro-labor third parties. Countries with parliamentary systems are more likely to have labor-friendly parties as part of governing coalitions (see Chapter 13 for a full discussion).

American corporations have also resorted to violence—by private business-backed militias as well as local law enforcement—to attack unions. For example, when the 1937 "Little Steel Strike" sought a 40-hour workweek and fair pay for steelworkers, some 2,500 workers and their supporters, which included their families, came together on Memorial Day to picket Republic Steel's Chicago plant. Chicago police, along with private police hired by Republic, brutally put down what had been a peaceful demonstration. Strikers were clubbed and beaten, and the police fired on the crowd. What became known as the Memorial Day Massacre left 10 dead and 100 hospitalized, including 30 wounded by police bullets (Quirke, 2008).

Since the late 1940s, America's labor-management laws have been strongly anti-union (Dreier, 2018). In 1947, the Republican-controlled Congress passed the Taft-Hartley Act, which allowed states to adopt "right-to-work" laws that prevent unions from requiring all employees in a unionized workplace to join the union or pay union dues—even if a majority of workers vote to support the unions. As a result, nonunionized workers are able to get a "free ride" because their wages reflect union-management agreements. Twenty-seven states now have such right-to-work laws. Among private-sector workers, for example, while 7.0 million workers belong to unions, 8.1 million workers are covered by union contracts; the comparable figures for public-sector workers are 7.0 million union members, with 7.7 million covered by union contracts. In other words, nearly 2 million nonunionized private- and public-sector workers benefit from the higher wages that unions have negotiated in their workplaces (National Labor Relations Board, 2023; U.S. BLS, 2023k).

The National Labor Relations Board (NLRB), created in the 1930s to protect workers' rights, has been weakened by anti-union federal and state policies. It has proven ineffective at protecting efforts to unionize workplaces, failing to take aggressive action when businesses illegally harass or fire union leaders (Estlund, 2006; Clawson & Clawson, 1999; Lichtenstein, 2019). Elections held under current NLRB rules put

workers and their unions at a disadvantage. Workers' ability to unionize is weakened because companies often harass or fire union activists, threaten workers who support the union, and coerce workers into voting against union formation (Mangundayao et al., 2022; McNicholas et al., 2019). It is estimated that firms spend a total of $340 million a year to hire anti-union consultants who use elaborate strategies to keep unions out; Amazon, for example, in 2022 spent over $14 million on anti-union consultants (Jamieson, 2023). Employers in the United States can require workers to attend company meetings on work time, where managers and consultants give anti-union speeches, show anti-union films, and distribute anti-union literature. Unions lack equal access to employees; to reach them, organizers must visit their homes or hold secret meetings. In two out of every five NLRB-supervised 2016–2017 elections, employers were charged with violating election laws; in 20 to 30 percent of elections, union organizers were illegally fired (McNicholas et al., 2019).

Workers in unions have higher pay, safer working conditions, and better benefits (like health insurance and retirement pensions) than workers who have the same jobs but no union representation. In 2022, for example, the median weekly earnings of full-time wage and salary nonunion workers ($1,029) were 85 percent of those of union workers ($1,216). But few workers are represented by a union. Union membership declined from a high of 36 percent of all workers in 1953 to roughly 25 percent of all workers in the 1970s, and to about 10 percent today (Hirsch et al., 2023). Only about 6 percent of private-sector workers are unionized, compared with about one-third who work for the government. The highest rates of unionization are in local government (39 percent), since police officers, firefighters, teachers, and office workers (like administrative assistants) are often unionized. In the private sector there is considerable variation in U.S. union membership by occupation and industry. For example, compared with the private sector as a whole, the unionization rate was more than three times higher among utility workers (21 percent) and twice as high among construction workers (12 percent). There is also considerable variation in union membership rates by state. The highest rates (15 percent or more) are found in New York State and the West Coast/Pacific states (California, Oregon, Washington, Alaska, Hawaii). The lowest rates (below 5 percent) are on the southern East Coast (Virginia, North and South Carolina, Georgia, Florida), in some South Central states (Arkansas, Louisiana, Texas), and in Idaho, Utah, and South Dakota (U.S. BLS, 2023l). Not surprisingly, these low rates tend to

occur in anti-union states with right-to-work laws (World Population Review, 2023c).

The rapid fall in private-sector union membership in the United States is due to a combination of factors (McCarthy, 2022). Manufacturing has traditionally been a stronghold for organized labor, while jobs in such services as wholesale and retail trade, health services, and leisure and hospitality have historically been more resistant to unionization. One major factor, therefore, is the rise of American-based global corporations, which moved factories out of the major industrial cities to small towns in the South in states with anti-union laws, and then to countries in South America, Central America, and Asia (most notably China—a country where independent labor unions are illegal). Global corporations have used this strategy to frighten American workers and weaken the bargaining power of unions in the manufacturing sector.

Even though service-sector jobs have generally been difficult to unionize, the fastest-growing U.S. labor union is the Service Employees International Union (SEIU), whose 2 million-plus members include more than 1.1 million health care workers and more than 1 million local and state government workers, public school employees, bus drivers, and child-care providers (SEIU, n.d.). Relatively high union densities are still found in protective services (33 percent) and in education, training, and library occupations (35 percent) (U.S. BLS, 2023k). And even unions traditionally tied to manufacturing have recognized that service workers, especially those whose jobs cannot be exported, are fertile grounds for unionization drives. The United Auto Workers, for example, has branched out to organize technical, office, and professional workers, including graduate students and other academic workers at the University of California and many other colleges and universities (Dayton & Batzell, 2017). Yet one of the largest employers of the growing number of service workers has been highly effective at stifling all efforts of its workforce to unionize: Walmart, the world's largest corporation. Walmart's 1.7 million U.S. workers, which Walmart prefers to call "associates," have been effectively prevented from forming unions through a variety of harassment techniques (Greenhouse, 2015; Lichtenstein, 2012a, 2012b; Wartzman, 2022). Walmart workers have not been acquiescent; in July 2019, after a Walmart employee was fired for posting an internal document on Reddit, Walmart workers flooded a subreddit with pro-union memes (Ongweso, 2019).

The Service Employees International Union (SEIU), which includes health care workers, is the fastest-growing U.S. labor union.

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One consequence of the erosion of workers’ power has been a revolt within the labor movement itself. As the U.S. organized labor movement shrank, it also splintered, which greatly hampered its effectiveness (Early, 2011a). A number of unions challenged the dominance of the once-powerful American Federation of Labor and Congress of Industrial Organizations (AFL-CIO), a confederation of 60 unions representing 12.5 million workers (AFL-CIO, 2023). Frustrated with the AFL-CIO’s inability to organize more workers or achieve significant gains, seven leading unions broke off in 2005 to form Change to Win (CTW), a more militant 5.5-million-person federation, including many women and minority service-sector workers. The unions that made up this new organization at the time represented more than a third of the original membership of the AFL-CIO. The revolt was led by the SEIU and its charismatic leader Andy Stern and originally included the SEIU, Teamsters, and five other unions, although internal divisions within the new federation led some of its original member unions to pull out.

Change to Win concentrated its initial organizing in areas where the jobs could not be sent overseas: For example, they focused on Walmart employees, hotel workers, and truckers who move goods from U.S. container ports. Among their demands was the passage of the Employee

Free Choice Act, which would require employers to recognize a union if the majority of its workers signed cards saying they were in favor. This “card check” approach to union membership would bypass elections, as currently required by law. Proponents claim that elections are seldom democratic because companies often harass or fire union organizers, threaten workers who support the union, and coerce workers into voting against union formation. Since its formation, however, Change to Win has lowered its expectations, now describing itself as a “strategic organizing center” serving a federation of labor unions (Early, 2011b).

Union drives among workers at Starbucks, Amazon, REI, Trader Joe’s, Google, Verizon, and other visible corporations, and successful strikes at manufacturing companies like John Deere and Kellogg, have made headlines. Widening inequality accounts for much of this newfound activism, but so does a new attitude about work—exacerbated by the Covid-19 pandemic—among younger workers, particularly workers of color. In fact, workers of color now account for 35 percent of the nation’s 14 million union members. Black workers are the most likely to be represented by unions: 11.5 percent are covered by a collective-bargaining agreement, compared with 10.3 percent of White workers, 9.0 percent of Hispanic workers, and 7.7 percent of Asian workers (U.S. BLS, 2023k). Cornell University’s School of Industrial and Labor Relations has developed a “labor action tracker” that reported a 60 percent increase in strikes between 2021 and 2022—a total of 424 work stoppages involving some 224,000 workers and nearly 4.5 million strike days. Strikes involved nurses, mental health care workers, grocery store workers, and K–12 teachers (Kallas et al., 2022; Sainato, 2022).

Higher education has provided one of the largest arenas for labor activism, with 15 college strikes involving faculty or graduate students in 2022 (Iafolla, 2023). The largest higher education strike in U.S. history shut down University of California classes for six weeks during the fall of 2022, ending in late December; 36,000 graduate student workers and 12,000 other academic employees demanded substantial pay increases, along with health care coverage for dependents and reimbursements for child care. The strike ended with teaching assistants, who had been making $23,000 a year, getting an increase to $34,000; graduate student researchers received a comparable increase. The agreement included expanded benefits for health care, child care, and transportation; it also provided student researchers with their first-ever contractual protections

(Hubler, 2022; Lichtenstein, 2022; University of California, 2022; Zinshteyn, 2023).

Even professional baseball players are engaged in labor activism, as sociologist Peter Dreier and political/legal scholar Robert Elias (2022) show in *Baseball Rebels: The Players, People, and Social Movements That Shook Up the Game and Changed America*(see also Candaele & Dreier, 2023). Players in the major league are represented by the Major League Baseball Players Association (MLBPA), a union that was founded in the 1950s but didn't win a collective-bargaining agreement until 1966, after it hired a full-time organizer, Marvin Miller. The agreement—the first ever in professional sports—initially raised major league players' minimum salary from $6,000 to $10,000 (about $56,000 to $93,000 today). Even more important, at the time team owners had the right to renew, trade, or revoke a player's contract without the player's consent, giving the owners control over their players' careers. The union eventually won high salaries and "free agency" (the right of players to negotiate with other teams) through legal challenges as well as strikes, including one that lasted 232 days during the 1994–1995 baseball season. Today, the average major league player's salary is $4.4 million, a figure that is heavily skewed by high salaries for superstars. (The median salary is $1.2 million.)

As Dreier and Elias argue, million-dollar major league salaries obscure another important aspect of labor struggle in baseball: sweatshop-level salaries in the minor leagues that serve as the "farms system" for the majors. The 30 major league teams—24 of which are owned by billionaires—own 120 minor league franchises that employ more than 5,000 players. This system is the gateway to the majors, but only 1 out of 10 players ever makes the big leagues. Many of those who do play major league baseball wind up playing for only a single season, or even just a few games (Candaele & Dreier, 2022). In 2022, most minor league players earned less than $15,000 a year, suffered all-night rides in uncomfortable buses, lived in overcrowded apartments with four or five teammates, and lacked adequate medical coverage. They were paid only for the baseball season (not even for spring training), and many had to take second or third jobs during the offseason just to make ends meet. While players have long complained privately, they risked losing the chance of playing in the majors if they protested or sought to create a union. Latino players and those from Latin America were especially

vulnerable; many of the latter depended on the little salary they received in order to send money back to their families.

In 2014 Garrett Broshuis, a lawyer who had spent five years in the minors after receiving All-American honors as a University of Missouri pitcher, filed a class-action lawsuit against Major League Baseball (MLB), its owners, and its commissioner. The lawsuit, which was eventually joined by more than 20,000 current and former players, claimed that minor league players weren't earning the federal minimum wage or given overtime pay, as required by law. MLB responded by successfully lobbying for legislation (called the Save America's Pastime Act) that exempted minor league players from the federal minimum wage and overtime laws—legislation that President Donald Trump signed as part of the 2018 omnibus spending bill. MLB teams have an average worth of more than $2 billion, in stark contrast to the minimal cost of minor league minimum wage and overtime. Player frustration grew when MLB shut down 42 teams in 2019 and canceled the entire minor league 2020 season because of Covid-19. (The major league season was shortened but not canceled). After minor league players engaged in more visible forms of protest (such as wearing wristbands during games) over living conditions, generating a lot of media attention, MLB agreed to provide free housing in 2022. That year MLB also settled Broshuis's 2014 lawsuit, agreeing to pay former and current minor league players $185 million for its violations of federal wage laws. These successes empowered minor league players, fueling a unionization drive supported by the Major League Baseball Players Association (MLBPA). In 2022, a majority of minor league players signed union cards affirming their desire to join the MLBPA. The owners reluctantly agreed to recognize the MLBPA as the voice of the minor league players and to negotiate a contract to improve wages, health care, travel, and other working conditions. To bolster its power and its solidarity with the broader labor movement, the MLBPA joined the AFL-CIO, the umbrella organization of the nation's unions.

Only a decade earlier, minor league baseball players were considered too vulnerable and frightened to form a union. But as Candaele and Dreier (2023) observed after the players won their union contract,

> As with any social movement, the minor leaguers' success depended on a combination of harsh conditions, missteps by baseball's owners, and the presence of a handful of agitators and organizers

> who persuaded competitive and individualistic ballplayers that only by joining forces could they improve the conditions of their work and not jeopardize the slim chance they had to climb the ladder to the big leagues.

Unions remain the strongest component of the movement for economic and social justice. Labor unions have increasingly embraced issues of environmental justice, LGBTQ+ equality, and women's rights: Liz Shuler was elected as the first woman to head the AFL-CIO in 2022, and a growing number of women are now heads of major national unions (Edmonds, 2023; Heinrichs, 2022). The biggest obstacle to an increase in union strength remains U.S. labor laws, although legislation currently in Congress seeks to change that. Passed by the House in 2021 but not by the Senate, the Protecting the Right to Organize (PRO) Act would make it easier for workers to unionize by addressing many of the barriers described above, including state right-to-work laws (all employees who benefit from collective bargaining would have to pay union fees to cover the cost) and what is seen as the unfair advantage employers currently have in shaping the outcome of union elections (the proposed "card check" approach would require employers to recognize a union if the majority of its workers signed cards saying they were in favor) (Congress.gov, 2023). This approach has been tried in the past, although it failed to garner congressional support. Whether a revitalized labor movement can change that remains to be seen.

## Low-Wage Work

Scholars associated with the Russell Sage Foundation's Program on the Future of Work have produced numerous studies on "the causes and consequences of the deteriorating quality of low-wage jobs in the United States." The results of their studies are not encouraging:

> In the thirty years after World War II, incomes grew rapidly for most Americans and unprecedented numbers were able to join the middle class. Beginning in the early 1970s, however, the real wages of male workers without a college degree began to fall, and today these workers earn real wages markedly lower than those of their counterparts thirty years ago. (Russell Sage, 2014)

Increasingly intense economic competition, now global, has led many firms to attempt to cut labor costs through wage freezes, cuts in benefits, increases in part-time or temp labor, offshoring, and other strategies that have had a negative impact on workers. But the hopeful news is that there are major differences in how advanced industrial nations have responded, suggesting that political decisions, rather than economic necessity, lie at the root of the problem.

The Russell Sage Foundation has sponsored a series of studies that have examined an important question: Are these trends inevitable, or are there government policies in some advanced industrial economies that have proven more beneficial to workers? By comparing policies and outcomes in the 19 wealthy industrial economies that are members of the Organization for Economic Co-operation and Development (OECD), the researchers found a clear answer: Policies by more pro-labor governments have made a difference. Low-wage labor, for example, varies from a low of 8 percent in Denmark to a high of 25 percent in the United States. Moreover, what these studies term the "inclusiveness" of a country's approach to labor-capital relations (collective-bargaining agreements, minimum wage laws, enforcement of national labor laws, health insurance, pensions, family leave, paid vacation time) can significantly influence workers' quality of life, even for low-wage workers (Gautié & Schmitt, 2010).

One follow-up study found that while low-wage work is sometimes thought to be a stepping stone to higher-wage jobs, this is seldom the case. By comparing the OECD countries, John Schmitt (2012) found that economic growth, even when measured by average per-person income, is not necessarily associated with a decline in the percentage of low-wage workers. On the other hand, he did find that a more "inclusive" governmental approach again does make a difference, both in the number of low-wage workers and their quality of life. While these are benefits that are widely shared among the OECD economies, they are weakest in the United States:

> [L]ow pay is often among the least of the labor-market problems facing low-wage workers, especially in the United States. . . . U.S. labor law offers workers remarkably few protections. U.S. workers, for example, have the lowest level of employment security in the OECD and no legal right to paid vacations, paid sick days, or paid parental leave. (Schmitt, 2012)

These studies clearly show that there may be some lessons about work and economic life to be learned from other wealthy industrial nations. And some governmental bodies seem to be adopting more pro-labor strategies: As we discussed in Chapter 8, 32 states and more than 80 cities and counties have set hourly minimum wages that are higher than the federal minimum ($7.25) (Labor Law Center, 2023).

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**CONCEPT CHECKS**

1. **What are three defining characteristics of transnational corporations?**
2. **According to Freeman and Rogers's research, how can workplaces be changed to better meet the desires of modern workers?**
3. **Provide three explanations for growing unemployment in the United States.**
4. **What is a labor union? Why have unions in the United States suffered from a decline in membership since the 1980s?**

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# Glossary

monopoly
: The domination by a single firm in a given industry.

oligopoly
: The domination by a small number of firms in a given industry.

transnational (or multinational) corporations
: Business corporations located in two or more countries.

international division of labor
: The specialization in producing goods for the world market that divides regions into zones of industrial or agricultural production or high- or low-skilled labor.

strike
: A temporary stoppage of work by a group of employees in order to express a grievance or enforce a demand.

unemployment rate
: The proportion of the population 16 and older that is actively seeking work but is unable to find employment.

union density

A statistic that represents the number of union members as a percentage of the number of people who could potentially be union members.

# 4 UNANSWERED QUESTIONS

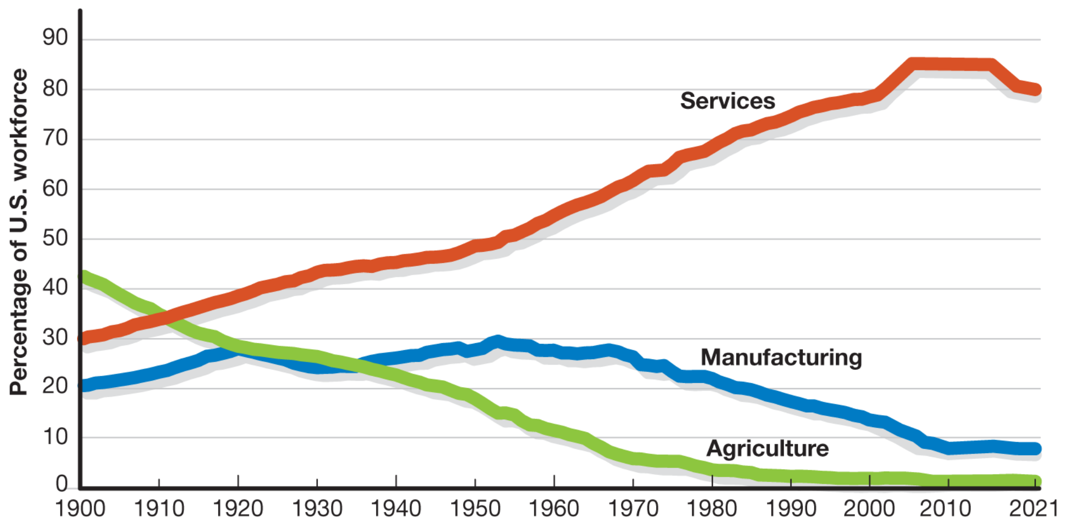
**Learn about the effect of automation on employment. Consider how work will change in the future.**

The nature of work and economic life in the United States—indeed, throughout the world—is rapidly changing. Technological advances, global supply chains, the information revolution, a revolution in shipping—all these are transforming the world at a pace unprecedented since the Industrial Revolution of the eighteenth and nineteenth centuries. As a result, the occupational structure in all industrialized countries has changed substantially since the beginning of the twentieth century, and the United States is no exception (**Figure 14.4**).

In 1900, about three-quarters of the employed American population did manual labor, either farming or blue-collar work such as manufacturing. White-collar professional and service jobs were much fewer in number. By 1960, however, more people worked in white-collar professional and service jobs than in manual labor. By 1993, the occupational system had basically reversed its structure from 1900. Almost three-quarters of the employed population worked in white-collar professional and service jobs, while the rest worked in blue-collar and farming jobs. These trends have continued; in 2022, only 7 percent of the U.S. workforce worked in manufacturing, while white-collar professional and service employment accounted for more than 81 percent (U.S. BLS, 2023k).

Figure 14.4

**THE RISE OF THE SERVICE SECTOR, 1900–2021**




Source: U.S. BLS, 2022a.

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The reasons for this shift, and how it will play out in terms of job opportunities for young people today, remain poorly understood. Perhaps because we are in the midst of such a significant transformation, there are disagreements over its causes and consequences.

# Will Automation Make Things Better or Worse for Workers?

The relationship between technology and work has long been of interest to sociologists. How is our experience of work affected by the type of technology involved? As industrialization has progressed, technology has assumed an ever-greater role at the workplace—from factory automation to the computerization of office work. The current information-technology revolution has attracted renewed interest in this question. Technology can lead to greater efficiency and productivity, but how does it affect the way work is experienced by those who carry it out? For sociologists, one of the main questions is how the move to more complex systems influences the nature of work and the institutions in which it is performed.

The concept of automation, or programmable machinery, was introduced in the mid-1800s, when Christopher Spencer, an American, invented the first fully automatic turret lathe, a programmable lathe that made screws,

nuts, and gears. The spread of automation provoked a heated debate among sociologists and experts in industrial relations over the effect of the new technology on workers, their skills, and their level of commitment to their work. In his influential book *Labor and Monopoly Capital*, Harry Braverman (1974) argued that automation was part of the overall "de-skilling" of the industrial labor force. By imposing organizational techniques that broke up the labor process into specialized tasks, managers were able to exert control over the workforce. In both industrial settings and modern offices, the introduction of technology contributed to this overall degradation of work by limiting the need for creative human input.

One function of automation, Braverman argued, was to increase control over workers; all that is required in a highly automated factory is an unthinking, unreflective body capable of endlessly carrying out the same unskilled task. Although Braverman was primarily writing about the kind of assembly line work that occurs in automobile-manufacturing facilities, his arguments apply with equal force to the giant electronics plants in China that assemble our smartphones and computers, the factories throughout the world that make our clothing, and the fast-food workers in McDonald's and Taco Bell who serve up our orders in a matter of minutes. The introduction of computerized technology in the workplace has resulted in a two-tiered workforce composed of a small group of highly skilled professionals with high degrees of flexibility and freedom in their jobs and a larger group of clerical, service, and production workers who lack such autonomy.

Technology has also led to the offshoring of manufacturing and service-sector jobs to countries where wages are lower. The firms that remain in the United States often employ fewer workers, thanks also to advances in technology (Hernandez, 2018; Sherk, 2010): automobile plants where robots assemble cars, banks that use ATMs, supermarkets and other retailers with automatic checkout services. While much has been made of "twenty-first-century onshoring"—the return of some manufacturing jobs to the United States—thanks to automation these jobs also require fewer low-skill workers (Bolter & Robey, 2020; Semuels, 2015).

A little more than 10 years ago, the Princeton economist Alan Blinder conducted a detailed analysis of the U.S. occupational structure, classifying hundreds of different jobs in terms of the likelihood they would be offshored. In a widely cited paper, he concluded that between

22 and 29 percent of all jobs, involving between 29 million and 38 million U.S. workers, were potentially offshorable. Many of the most highly vulnerable jobs, he argued, were not manufacturing jobs but rather white-collar jobs such as computer programmers, accountants, statisticians, or film editors (Blinder, 2007).

Robots weld car frames at the Hyundai factory in Beijing.

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How well did Blinder’s predictions stand the test of time? The answer is, not very well. A recent study (Ozimek, 2019) looked again at jobs supposedly threatened by offshoring and concluded that instead of going to countries like India or China, many of these jobs were going to the homes of U.S. workers! According to this study, at least 5 percent of the U.S. workforce now works remotely, thanks to advances in information technology—and this doesn’t include workers who do only some of their work from home. In fact, some of these workers are even working remotely for non-U.S. clients. It turns out that U.S. knowledge workers often have a competitive advantage over foreign workers: They share a common language and culture with their employers, not to mention that employing them eliminates the challenge of coordinating work a half a world (and 12 time zones) away. Blinder himself, in acknowledging the new study, admitted, “Where in retrospect I missed the boat is in thinking that the gigantic gap in labor costs between here and India would push it

to India rather than to South Dakota. . . . There were other aspects of the costs to moving the activities that we weren't thinking about very much back then when people were worrying about offshoring" (Casselman, 2019).

If offshoring has not created a "white-collar job apocalypse" (Casselman, 2019), what about rapid advances in artificial intelligence in such areas as business, decision making, and "big data" analysis, which hold the promise of automating occupations that currently require college degrees? The services provided by professionals such as lawyers, accountants, radiologists, and many middle managers can increasingly be performed by artificial intelligence software. The Biden White House recently released a report that concluded that "AI has the potential to automate 'nonroutine' tasks, exposing large new swaths of the workforce to potential disruption"—and that these include "tasks in high-skill jobs that until now had never been threatened by any kind of automation" (White House, 2022a, pp. 3, 41). The authors of the report even asked the latest AI-based software, Microsoft's GPT-3, "What are the downsides of AI for workers?" The bot, which dutifully (and instantaneously) sifted through millions of websites, documents, reports, published and unpublished scientific (and unscientific) papers, summarized its findings. These included "job losses—one of the potential downsides of AI is that it could lead to increased unemployment as machines begin to replace human workers in a variety of industries," and "inequality—another potential downside of AI is that it could exacerbate existing economic inequality as the benefits of AI technology disproportionately accrue to those who are already wealthy and have access to the best resources" (White House, 2022a, p. 16). Whether or not these findings are accurately predictive—or whether they simply reflect biases in the mindless search algorithms employed by all AI—they clearly point to widespread concerns in the literature reviewed. Some commentators have even predicted that robotics will result in a jobless future in which machines do most of our labor: "Robots will drive our cars, manufacture our goods, and do our chores" (Wadwha, 2014). As one technology blog has noted, "The evidence is irrefutable that computerized automation, networks and artificial intelligence (AI)—including machine-learning, language-translation, and speech- and pattern-recognition software—are beginning to render many jobs simply obsolete" (*Economist*, 2011).

Estimates about how many jobs will actually be lost—or whether they will be replaced by other jobs that require new skills—are necessarily speculative and vary widely, ranging as high as two-fifths of all jobs in the United States (Brynjolfsson & McAfee, 2014; Ford, 2009, 2010). Yet there have been few studies of what actually happens when firms automate. One study looked at 36,500 Dutch firms that annually employed an average of 5 million workers in 2000–2016. It found that five years after a firm adopted automation services, its workers experienced a decrease in days worked, resulting in a 9 percent drop in their incomes. The workers most severely affected were older, middle-educated workers in smaller firms (Bessen et al., 2019). As Blinder's work, discussed above, clearly illustrates, even the best research is fraught with uncertainty.

Automation has also created a host of new services, from ride-sharing services to the marketing giant Amazon, which has put many small (and some large) retailers out of business. Why wait to hail down a taxi, when you can hail an Uber or Lyft on your phone, have one arrive usually within a few minutes thanks to GPS location services, and have your credit card automatically charged with no cash or even physical credit card needed? Why trudge down to the local bookstore, appliance store, furniture store, or perhaps even grocery store (now that Amazon has bought Whole Foods), looking for an item that may or may not be there, and wait in line to pay, when with a click on your smartphone Amazon can usually deliver pretty much anything to your home within a couple of days, often at bargain-basement prices?

**Table 14.3 APPLYING SOCIOLOGY TO WORK AND ECONOMIC LIFE**

| CONCEPT | APPROACH TO UNDERSTANDING WORK AND ECONOMIC LIFE | CONTEMPORARY APPLICATION |
| --- | --- | --- |

| CONCEPT | APPROACH TO UNDERSTANDING WORK AND ECONOMIC LIFE | CONTEMPORARY APPLICATION |
|---|---|---|
| **Fordism** | A dominant form of production in the twentieth century, pioneered by Henry Ford (for whom it is named). Characterized by large, bureaucratic corporations that design, market, and mass produce products on assembly lines that require workers to repeatedly perform the same task. While this greatly increases productivity, it also results in a high degree of management control over factory workers. | General Motors, whose revenues made it the largest corporation in the mid-twentieth century, typifies this process. |
| **Post-Fordism** | A dominant form of production in the twenty-first century, characterized by flexible business structures in which large corporations specialize in the most profitable activities (designing and marketing their products), with actual manufacturing outsourced to independent contract factories which compete with one another by lowering their costs in order to get the work. | Giant retailers such as Walmart, whose revenues made it the largest corporation in the early twenty-first century, typify this process. |

| CONCEPT | APPROACH TO UNDERSTANDING WORK AND ECONOMIC LIFE | CONTEMPORARY APPLICATION |
|---|---|---|
| **Global outsourcing** | The principal way that flexible production is achieved in the early twenty-first century, in which factory production is outsourced to low-wage countries around the world. This often results in low wages, harsh and unsafe working conditions, and the absence of environmental regulations, as factories around the world compete with one another for manufacturing. | The apparel and electronic assembly industries, in which our clothing and computer electronics are made in factories in China, India, or in developing countries in Asia and Africa. |
| **The informal economy** | That sector of the economy that is outside the sphere of regular employment ("off the books") and therefore unreported to the government. It is common in wealthy countries and often a major part of the economy in poor countries. Since it is unregulated, workers lack legal protections. | Includes many activities that would be legal if reported (such as housecleaning, yard work, and babysitting), as well as illegal activities (such as drug dealing and criminal behavior in general). |

| CONCEPT | APPROACH TO UNDERSTANDING WORK AND ECONOMIC LIFE | CONTEMPORARY APPLICATION |
|---|---|---|
| **The gig economy** | A recently emerging sector of the economy that involves extreme flexibility: temporary or freelance workers on short-term contracts, often operating on their own, with low pay, the absence of benefits such as health insurance or retirement packages, and few or no legal protections. | Lyft and Uber drivers; Instacart; TaskRabbit; Handy; Thumbtack; Fiverr. |

Automation has made all this possible. Whether the seeming benefits to consumers will be outweighed by the cost to workers and small business remains to be seen. Uber and Lyft drivers—like others in the gig economy—may enjoy the freedom to operate out of their homes (or cars), but they are also notoriously underpaid and lack basic benefits such as health insurance or retirement packages (Rao, 2019; Zoepf et al., 2018).

Automation and artificial intelligence are disruptive technologies, much like the steam engine, which displaced animal power and ushered in the Industrial Revolution. Low-cost “big-box” booksellers, like Barnes & Noble and Borders, resulted in the demise of many mom-and pop bookstores. Amazon, in turn, did the same for many of the big-box booksellers, not to mention all retailers once Amazon moved from books into selling pretty much everything (Pandey, 2018). While many retail jobs have been lost as a result of Amazon’s success, the company reports employing 2.6 million people worldwide, including creating 750,000 jobs in the United States since the beginning of the Covid-19 pandemic in 2020 (Amazon, 2022, p. 3). Amazon also plans to spend $700 million to retrain a third of its workforce for data and analytics roles (Landi, 2019).

How all this will play out over your lifetime will shape not only your world of consumption but, perhaps more importantly, your world of

work.

## What Will the Economy of the Future Look Like?

As we have seen, there has been significant job loss in manufacturing, with a corresponding growth in service-sector jobs. Unlike the jobs that have been lost in manufacturing, service-sector jobs tend to be nonunionized and low wage. Some observers suggest that what is occurring today is a transition to a new type of society no longer based primarily on manufacturing or low-paying service work. We are entering, they claim, a phase of development beyond the industrial era altogether. A variety of terms have been coined to describe this new social order, such as the *postindustrial society*, the *information age*, and the *new economy.* The term that has come into most common usage, however, is knowledge economy.

A precise definition of the knowledge economy is difficult to formulate, but in general, it refers to an economy in which ideas, information, and forms of knowledge underpin innovation and economic growth. In a knowledge economy, much of the workforce is involved in research and development; advanced technologies; and the design, marketing, sales, and service of innovative products, rather than in their physical production. Employees in this economy can be termed “knowledge workers.” The knowledge economy is dominated by the constant flow of information and opinions and by the powerful potential of science and technology.

How widespread is the knowledge economy at the start of the twenty-first century? The World Bank created a Knowledge Economy Index (KEI), which rates countries based on their overall preparedness to compete in the knowledge economy (Chen & Dahlman, 2006). Knowledge-based industries are understood broadly to include high technology, education and training, research and development, and the financial and investment sector. Knowledge-economy jobs are typically said to include scientists and engineers engaged in innovative research and development, and research scholars more generally; highly skilled occupations that involve the use of advanced technology; financial management and services; and, in general, any occupation or profession that requires the ability to think

symbolically and analytically (and that typically involves higher education and specialized skills) (Castells, 2000).

The current, expanded version of the KEI (see, for example, Pospisil et al., 2019) uses four “pillars” to gauge a country’s knowledge-economy performance. To rank high on the index, a country must have

1. A high degree of educational attainment at the secondary, college, and technical levels, providing the skills needed for innovation;
2. Access to advanced communications, including widely accessible broadband networks;
3. Scientific accomplishments, as measured by high levels of spending on research and development, publications in scientific journals, and number and quality of patents; and
4. An open political and economic environment, including adherence to the rule of law, an effective regulatory environment; and openness to free trade with other countries.

Based on these measures, one study, using 2012 data, ranked the Scandinavian nations (Sweden, Finland, Denmark, and Norway) at the top of the list, since they score high on all these measures (Ojanperä et al., 2019). The United States is not far behind. China, on the other hand —partly because it lacks the open political and economic environment that makes up one of the four pillars of the index—ranks far behind, roughly in the same category as Russia, Mexico, and much of Latin America.

While no one can deny that innovation is an important driver of economic competitiveness, or that knowledge is a key component of innovation, it is not clear that all four pillars of the knowledge economy must be satisfied for a country to succeed economically.

China, for example, ranks poorly on the KEI—yet has rapidly advanced technologically over the past decade, to the point where in a number of areas it appears to be rivaling the United States. One study of 17.2 million scientific papers in the hottest technology fields, published between 2013 and 2018, found that China dominated 23 of the 30 fields (the United States dominated the remaining 7). Some key fields where China had the largest number of scientific papers included batteries (for example, organic thin-film solar and lithium-ion batteries); semiconductors; new and advanced materials (for example,

photocatalysts and carbon quantum dots); and biotech (for example, nucleic acid–targeted cancer treatment). Another study, by the Australian Strategic Policy Institute (ASPI), found that China leads in 37 of 44 technologies it tracked, including electric batteries, nanotechnology, synthetic biology, hypersonics, and 5G and 6G technology (Gaida et al., 2023; Hurst, 2023). China now leads the world in the sheer volume of internet retail transactions; a Chinese company, Huawei, is globally dominant in the development and sales of 5G internet equipment; and China's space program has landed a vehicle on the far side of the moon.

The Chinese government has played a key role in these achievements. In 2006, it developed a 15-year national science and technology plan intended to end China's reliance on other countries for advanced technologies. The plan identified key areas for large-scale public investment, in the belief that the state should play a key role—alongside the market—in determining which areas would drive innovation (and funding them). Other 5- and 15-year plans have followed. This state-centered approach to development runs counter to the more market-driven approach championed by the United States and other advanced industrial countries and reflected in the KEI measures that give China poor marks despite the country's obvious achievements. (It should be noted that China's success is not only due to state development plans and public investment in key fields; China has also derived some of its technological gains by requiring foreign firms that operate in China to share their technology, as well as by outright technological theft; see Appelbaum et al., 2018).

China is offering the world another model, and it remains an open question whether or not it will succeed in its efforts to create a knowledge economy in which the government plays a key role at all levels. Will China's heavy-handed state-led approach encourage knowledge economy innovation—or stifle it?

What does this portend for the United States? No one can say for sure, but it seems unlikely that the American nonfarm workforce—which in January 2022 included 166 million employed people, along with another 6 million people (3.4 percent of the labor force) looking for work (U.S. BLS, 2023f)—will all somehow become knowledge-economy workers. Will current economic changes produce another period of sustained economic growth, in which workers at all levels become a scarcity, with wages and salaries steadily rising, as they did in the post–World War II

period? Or will the American workforce increasingly be split into two categories: those with the educational background, skills, and good fortune to thrive as knowledge workers, and everyone else, who may find themselves chasing after a dwindling number of manufacturing jobs and lower-paying service work?

# How Permanent Is Your Job Likely to Be?

This leads to another question: Does the future of work mean the end of the full-time, lifelong career with one or at best a few employers?

Since the mid-1980s, in all the industrialized countries except the United States, the average length of the working week has become shorter. Workers still undertake long stretches of overtime, but some governments are beginning to introduce new limits on permissible working hours. In France, for example, annual overtime is restricted to a maximum of 130 hours a year. In most countries, there is a general tendency toward shortening the average working career. More people would probably quit the labor force at age 60 or earlier if they could afford to do so.

Another important employment trend of the past decade has been the replacement of full-time workers by part-time workers and contingency workers, or workers who are hired on a contract or freelance basis often for a short-term task. Most temporary or contingent workers are hired for the least-skilled, lowest-paying jobs. But, increasingly, contingent work is also making its way into professional occupations, including higher education. Contingent faculty now constitute nearly half of faculty at four-year higher education institutions. In a recent survey of roughly 1,400 colleges and universities conducted by the American Association of University Professors (2022), 53.5 percent reported having replaced tenured positions with fixed-term appointments, such as adjunct faculty, over the previous five years. As a general rule, part-time and contract jobs do not include the benefits associated with full-time work, such as medical insurance, paid vacation time, or retirement benefits. Because employers can save on the costs of wages and benefits, the use of part-time and contingent workers has become increasingly common. A 2020 U.S. Census survey of 300,000 businesses found that a third of the firms used contractors and half used part-time workers (U.S. Government

Accountability Office, 2022). A 2017 government study (the most recent available) found that nearly 6 million workers had contingent (temporary) jobs and nearly 16 million had what it termed “alternative” jobs that also lacked security; together, this represented 14 percent of the total U.S. workforce (U.S. BLS, 2018b).

Contingent faculty, including graduate student instructors, at New York University protest for better pay, benefits, and job security.

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The temporary employment agency ManpowerGroup, founded in Milwaukee, Wisconsin, in 1948, has become a global leader in the provision of temporary workers. This company reports placing 600,000 temps (Manpower prefers the term “associates” to temps) with 100,000 clients in 75 countries and territories (ManpowerGroup, 2023). Kelly Services, founded in Detroit in 1946 and previously known as Kelly Girls (it was renamed in 1966 “to reflect the growing services of the company”) found jobs for more than 350,000 workers in 2021 (Kelly, 2023). Temp agencies like ManpowerGroup and Kelly Services provide labor on a flexible basis around the world, in blue-collar manufacturing, routine service, and now even high tech. Clearly, temporary labor has become a critical component of the worldwide organization of work and occupations.

How will work change in the future? It appears very likely that people will take a more active look at their lives than in the past, moving in and out of paid work at different points. These are positive options, however, only when they are deliberately chosen. The reality for most is that regular paid work remains the key to day-to-day survival and that part-time work is experienced as a hardship rather than an opportunity.

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**CONCEPT CHECKS**

1. **Why does automation lead to worker alienation?**
2. **What are the fastest-growing job sectors? Based on these trends, what are the implications for careers in the future?**
3. **In your opinion, how will globalization change the nature of work?**

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# Glossary

automation
: Production processes monitored and controlled by machines with only minimal supervision from people.

knowledge economy
: A society no longer based primarily on the production of material goods but instead on the production of knowledge. Its emergence has been linked to the development of a broad base of consumers who are technologically literate and have made new advances in the computing, entertainment, and telecommunications part of their lives.

# THE BIG PICTURE

# Chapter 14

## Work and Economic Life

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**Exercises:** Thinking Sociologically

1. Explain the meaning of globalization of the modern economy. Explain how this textbook sees globalization affecting workers in developing countries and in advanced industrial societies.
2. Discuss some of the important ways that the nature of work will change for the contemporary worker as companies apply more automation and larger-scale production processes and as oligopolies become more pervasive. Explain each of these trends and how they affect workers, both now and in the future.

# BASIC CONCEPTS p. 529

## Learning Objectives

Understand that modern economies are based on the division of labor and economic interdependence.

### Terms to Know

work • occupation • economy • capitalism • technology • housework • division of labor • economic interdependence

### Concept Checks

1. Describe six characteristics that shape one’s everyday experiences at work.
2. Name two forms of unpaid labor.
3. Contrast the division of labor in traditional and modern societies.

## THEORIES OF WORK AND ECONOMIC LIFE p. 533

### Learning Objectives

Consider the different forms that capitalism has taken, and understand how a shift in the predominant form of industrial organization in modern society has shaped the kinds of jobs people are likely to find.

### Terms to Know

corporations • family capitalism • entrepreneur • managerial capitalism • welfare capitalism • institutional capitalism • interlocking directorates • global capitalism • Fordism • Taylorism • low-trust systems • high-trust systems • alienation • post-Fordism • flexible production • outsourcing • informal economy

### Concept Checks

1. Describe five forms that capitalism has taken.
2. What are two key differences between Fordism and post-Fordism?
3. Define and provide an example of an informal economy.

# CURRENT RESEARCH ON WORK AND ECONOMIC LIFE p. 547

## Learning Objectives

Recognize the importance of the rise of large corporations; consider particularly the global effect of transnational corporations. Learn about the challenges facing workers today, including growing unemployment, the decline of labor unions, the rise of low-wage work, and the global trading system.

## Terms to Know

monopoly • oligopoly • transnational (or multinational) corporations • international division of labor • strike • unemployment rate • union density

## Concept Checks

1. What are three defining characteristics of transnational corporations?
2. According to Freeman and Rogers's research, how can workplaces be changed to better meet the desires of modern workers?
3. Provide three explanations for growing unemployment in the United States.
4. What is a labor union? Why have unions in the United States suffered from a decline in membership since the 1980s?

# UNANSWERED QUESTIONS p. 570

## Learning Objectives

Learn about the effect of automation on employment. Consider how work will change in the future.

## Terms to Know

automation • knowledge economy

## Concept Checks

1. Why does automation lead to worker alienation?
2. What are the fastest-growing job sectors? Based on these trends, what are the implications for careers in the future?
3. In your opinion, how will globalization change the nature of work?

# Glossary

work
: The activity by which people produce from the natural world and so ensure their survival. Work should not be thought of exclusively as paid employment. In traditional cultures, there was only a rudimentary monetary system, and few people worked for money. In modern societies, there remain types of work that do not involve direct payment (e.g., housework).

occupation
: Any form of paid employment in which an individual regularly works.

economy
: The system of production and exchange that provides for the material needs of individuals living in a given society. Economic institutions are of key importance in all social orders. What goes on in the economy usually influences other areas of social life. Modern economies differ substantially from traditional ones because the majority of the population is no longer engaged in agricultural production.

capitalism
: An economic system based on the private ownership of wealth, which is invested and reinvested in order to produce profit.

technology
: The application of scientific knowledge of the material world to production, involving the creation of material instruments (such as machines) used in human interaction with nature.

housework

Unpaid work carried out in the home, usually by women; domestic chores such as cooking, cleaning, and shopping. Also called *domestic labor*.

division of labor

The specialization of work tasks by means of which different occupations are combined within a production system. All societies have at least some rudimentary form of division of labor, especially between the tasks allocated to men and those performed by women. With the development of industrialism, the division of labor became vastly more complex than in any prior type of production system. In the modern world, the division of labor is international in scope.

economic interdependence

In the division of labor, the dependence of individuals on others to produce many or most of the goods they need to sustain their lives.

corporations

Business firms or companies.

family capitalism

Capitalistic enterprise owned and administered by entrepreneurial families.

entrepreneur

The owner/founder of a business firm.

managerial capitalism

Capitalistic enterprises administered by managerial executives rather than by owners.

welfare capitalism

The practice by which large corporations protect their employees from the fluctuations of the economy.

institutional capitalism

Consolidated networks of business leadership in which corporations hold stock shares in one another, resulting in increased concentration of corporate power.

interlocking directorates

Linkages among corporations created by individuals who sit on two or more corporate boards.

global capitalism

The current transnational phase of capitalism, characterized by global markets, production, and finance; a transnational capitalist class whose business concerns are global rather than national; and

transnational systems of governance (such as the World Trade Organization) that promote global business interests.

Fordism
: The system of production pioneered by Henry Ford, in which the assembly line was introduced.

Taylorism
: A set of ideas, also referred to as *scientific management*, developed by Frederick Winslow Taylor, involving simple, coordinated operations in industry.

low-trust systems
: Organizational or work settings in which people are allowed little responsibility for, or control over, the work task.

high-trust systems
: Organizational or work settings in which individuals are permitted a great deal of autonomy and control over the work task.

alienation
: The sense that our own abilities as human beings are taken over by other entities. The term was originally used by Karl Marx to refer to the projection of human powers onto gods. Subsequently, he used the term to refer to the loss of workers' control over the nature and products of their labor.

post-Fordism
: The period characterized by the transition from mass industrial production, using Fordist methods, to more flexible forms of production favoring innovation and aimed at meeting market demands for customized products.

flexible production
: A manufacturing system involving a complex network of contract factories that enable both the process of production, and the product itself, to be quickly modified in order to meet changing demand and market conditions.

outsourcing
: A business practice that sends production of materials to factories around the world. The components of one final product often originate from many different countries and then are sent elsewhere to be put together and sold. Factories from different countries must compete with one another to obtain business.

informal economy
: Economic transactions carried on outside the sphere of orthodox paid employment.

monopoly
The domination by a single firm in a given industry.

oligopoly
The domination by a small number of firms in a given industry.

transnational (or multinational) corporations
Business corporations located in two or more countries.

international division of labor
The specialization in producing goods for the world market that divides regions into zones of industrial or agricultural production or high- or low-skilled labor.

strike
A temporary stoppage of work by a group of employees in order to express a grievance or enforce a demand.

unemployment rate
The proportion of the population 16 and older that is actively seeking work but is unable to find employment.

union density
A statistic that represents the number of union members as a percentage of the number of people who could potentially be union members.

automation
Production processes monitored and controlled by machines with only minimal supervision from people.

knowledge economy
A society no longer based primarily on the production of material goods but instead on the production of knowledge. Its emergence has been linked to the development of a broad base of consumers who are technologically literate and have made new advances in the computing, entertainment, and telecommunications part of their lives.

# 15 Families and Intimate Relationships

What proportion of children in the United States currently live in a "typical" American family made up of two parents and their children?

1. **25 percent**
2. **50 percent**
3. **70 percent**
4. **90 percent**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

## LEARNING OBJECTIVES

1. **Basic Concepts** Learn how sociologists define and describe families.
2. **Theoretical and Historical Perspectives on Families** Review the development of sociological thinking about families. Learn how families have changed over the last 500 years, and the social and economic factors underlying these changes.
3. **Research on Families Today** Learn about patterns of dating, cohabitation, marriage, same-sex unions, childbearing, divorce, remarriage, and child-free families. Analyze how these patterns today differ from those of other periods. Understand race, ethnic, and social-class differences in contemporary families.
4. **Unanswered Questions** Understand the ways that cohabitation differs from marriage, how parents' sexual orientation affects their children, and the linkage between marital status and happiness.

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If you answered *b* (50 percent), you would be correct. But if you answered *c* (70 percent), you would also be correct. How is that possible? This is a bit of a trick question because it depends on precisely how you think about families. Roughly half of all children currently live in households with two parents who are in their first marriage. But then another 7 percent of children live with two parents who are cohabiting but not legally married to each other. And another 15 percent of children live with two parents who married each other after their first marriages ended. If you add these numbers together, then fully 68 percent live with two parents, although these two-parent families are a highly diverse group (Federal Interagency Forum on Child and Family Statistics, 2019).

Most scholars agree that there is no such thing as a "typical" family in the United States today. As popular television shows such as *Modern Family*, *Blackish*, and *This Is Us* reveal, no one family form or structure accounts for the majority of U.S. households today. Families today include people who live alone, single parents with children, stepfamilies, grandparents who share a home with their grandchildren, same-sex couples both with and without children, cohabiters both with and without children, divorced spouses who share a home because they can't afford two separate homes, and married spouses who live miles apart due to their jobs. The notion that the "typical" household includes a breadwinner dad, a stay-at-home mom, and two perfect children is even more dated. Just 14 percent of

children under 18 live in a household with a breadwinner father and stay-at-home mother in their first marriage (Livingston, 2015). Families today also are more dynamic than ever, meaning that marriages end in divorce, divorced people remarry or form new cohabiting unions, and single parents may find a new partner. These partnership transitions mean that children may live with multiple different parents or parent-like figures during the first 18 years of life; these changes bring challenges (as well as benefits) that shape child well-being (Fomby & Cherlin, 2007).

Census data can tell us what the “statistical” norm is, or those behaviors that are objectively more or less common in the United States today. Sociologists, by contrast, help shed light on what the “cultural” norm is—and why. Are certain family forms considered “best” for the health and well-being of American society? Or do all family forms confer their own distinctive benefits? And, if so, why do so many Americans still hold on to the belief that some family forms are superior to others, often couching their arguments in terms of “what’s best for the children”?

Sociologists David Popenoe and Judith Stacey engaged in a decades-long debate over this very question. Popenoe (1993, 1996) argues that families have changed for the worse since 1960. Over the past six or seven decades, divorce, nonmarital births, and cohabitation rates have increased, while marriage and marital fertility rates have decreased. He claims these trends underlie social problems such as child poverty, adolescent pregnancy, substance abuse, and juvenile crime. Increasing rates of divorce and nonmarital births throughout the latter half of the twentieth century created millions of female-headed households and have removed men from the child-rearing process—a situation that is harmful to children, Popenoe argues.

Gabrielle Union, a successful actress, and former basketball player Dwyane Wade are raising a blended family with children from Wade's previous marriage and children of their own.

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Stacey (1998, 2011) counters that the "traditional" American family of the 1950s—praised by Popenoe, conservative politicians, conservative media sources like Fox News, and online communities like One Million Moms as the panacea for all social problems—is a dated and oppressive institution. According to Stacey, the "modern family" with "breadwinner father and child-rearing mother" perpetuated the "segregation of the sexes by extracting men from, and consigning White married women to, an increasingly privatized domestic domain." The modern family has been replaced by the "postmodern family"—single mothers, blended families, cohabiting couples, same-sex unions, dual-career families, and families with a breadwinning mother and stay-at-home dad. The postmodern family is well suited to meet the challenges of the current economy and is an appropriate setting for raising children, who need capable, loving caretakers—regardless of their gender, gender identity, marital status, employment status, or sexual orientation, argues Stacey.

Popenoe agrees that children need capable, loving caretakers, yet he maintains that "two parents—a father and a mother—are better for a child than one parent." He claims that biological fathers make "distinctive, irreplaceable contributions" to their children's welfare. Fathers offer a

strong male role model to sons, act as disciplinarian for trouble-prone children, provide daughters with a male perspective on heterosexual relationships, and, through their unique play styles, teach their children about teamwork, competition, independence, self-fulfillment, self-control, and regulation of emotions. Mothers, on the other hand, teach their children about nurturance and communion, the feeling of being connected to others. Both needs can be met only through the gender-differentiated parenting of a mother and father, Popenoe argues—revealing adherence to the gender binary that you learned about in Chapter 10.

Stacey retorts that the postmodern family is better suited to the postmodern economy, in which employment has shifted from unionized heavy industries to nonunionized clerical, service, and new industrial and high-tech sectors. The loss of union-protected jobs means that many men no longer earn enough to support a wife and children. And, during the recessionary years of the early twenty-first century, men who suffered long-term unemployment often relied on their wives to fully support their families. At the same time, demand for clerical and service labor, escalating consumption standards, increases in women's educational attainment, and high and steady divorce rates have led most women, including mothers of young children, to work for pay outside the home.

Stacey also disagrees with media rhetoric and claims by conservatives, such as Popenoe, who elevate the married, two-parent family as the "ideal" family form. Rather than condemning contemporary family forms, Stacey reasons, family sociologists and policy makers should develop strategies to mitigate the harmful effects of family instability on children. She suggests restructuring work schedules and benefit policies to accommodate familial responsibilities; redistributing work opportunities to reduce unemployment rates; enacting comparable worth standards of pay equity to enable women as well as men to earn a family wage; providing universal health care, prenatal and child care, and sex education; and rectifying the economic inequities of divorce (Biblarz & Stacey, 2010).

Claiming that "marriage must be re-established as a strong social institution," Popenoe argues that employers should stop relocating married couples with children and should provide more generous parental leave. He also supports a two-tiered system of divorce law. Marriages without minor children would be relatively easy to dissolve, but

marriages with young children would be dissolvable only by mutual agreement or on grounds involving a wrong by one party against the other. The proposal has been met with skepticism among feminist scholars, who address the costs for children and adults alike of reinstating grounds of fault for divorce.

Where does the “truth” lie—with Stacey, with Popenoe, or somewhere in between? In this chapter, we will learn what families actually look like in the twenty-first century, how families have changed through history, the wide range of forms that families take, and some of the challenges family members face today. We will see that the postmodern family is clearly the statistical norm in the United States in the twenty-first century. Although cultural norms tend to lag slightly behind statistical realities, in recent years the number of television shows, films, and advertising campaigns upholding a broad and inclusive image of “family” has flourished.

For instance, an ad for Google Home features gay dads Ross and Alex asking the device for information on local traffic so that they can decide which parent should drive their children to school (Rook, 2017), while a TV spot for Honey Maid features a young boy whose parents have divorced and each remarried. When Isaac talks about his blended family, he casually mentions that his stepdad has black hair and his dad has brown hair, but he doesn’t see other differences. Both men are his “dads.” Starting more than a decade ago, department stores like Target began actively marketing their wedding registries to same-sex couples, who could identify as “bride,” “groom,” or “partner” as they registered for wedding gifts (Maxwell, 2012). These cultural images and practices have contributed to more expansive attitudes about what constitutes a “normal American family.” In this chapter we will show how common such patterns are and discuss the implications of shifting families for the well-being of children and their parents.

# 1 BASIC CONCEPTS

**Learn how sociologists define and describe families.**

A family is a group of people directly linked by kin connections, the adult members of which take care of the children. Kinship ties are connections among individuals, established either through marriage, the lines of descent that connect blood relatives (mothers, fathers, children, grandparents, etc.), or adoption. Marriage can be defined as a socially acknowledged and approved sexual union between two adult individuals. When two people marry, they become kin to each other; however, the marriage bond also connects a wider range of kinspeople. Parents, brothers, sisters, and other blood relatives become relatives of the partner, or “in-laws,” through marriage.

Virtually all societies contain what sociologists and anthropologists call the nuclear family, two adults living together in a household with their own or adopted children. In most traditional societies, the nuclear family was part of a larger kinship network. When close relatives, in addition to a married couple and children, live either in the same household or in a close and continuous relationship with one another, we speak of an extended family. An extended family may include grandparents, brothers and their wives, sisters and their husbands, aunts, nephews, and so on.

(left) The Kazakhs in Mongolia usually live in extended families and collectively herd their livestock. The youngest son will inherit the father's house, and the elder sons will build their own houses close by when they get married. (right) Parents wait for the metro with their child. How is a nuclear family different from an extende family?

Whether nuclear or extended, families can be divided into families of orientation, or families of origin, and families of procreation. The first is the family into which a person is born or adopted. The second is the family into which one enters as an adult; for those who have children, it is the context in which a new generation of children is brought up. A further distinction concerns place of residence. In the United States, when two people marry, they do not necessarily set up their own household in the same area where either spouse's parents live, although they often do so. In some other societies, however, married couples live close to or within the same dwelling as the parents of either or both spouses. When the couple lives near or with the female spouse's parents, the arrangement is matrilocal. In a patrilocal pattern, the couple lives near or with the male spouse's parents.

In Western societies, marriage, and therefore family, is associated with monogamy. It is illegal for a person to be married to more than one individual at any one time. But in several parts of the world, monogamy is far less common than it is in Western nations. In his classic research, George Murdock (1967, 1981) compared several hundred societies from 1960 through 1980 and found that polygamy, a marriage that allows a person to have more than one spouse, was permitted in over 80 percent of them (see also Gray, 1998). There are two types of polygamy: polygyny, in which a man may be married to more than one woman at the same time, and polyandry, much less common, in which a woman may have two or more husbands simultaneously. Of the 1,231 societies tracked, Murdock found that just 15 percent of societies were monogamous, 37 percent had occasional polygyny, 48 percent had more frequent polygyny, and less than 1 percent had polyandry (Murdock, 1981). In contemporary society, polygamy rates have been particularly high in Africa's "polygamy belt" reaching from Senegal to Tanzania, where as many as one-third of women were in polygamous unions (Jacoby, 1995).

Yet recent work suggests that polygamy has grown less common over time due to social and economic conditions, including increasing levels of democracy, a declining acceptance of arranged marriage, an increase in marriages based on a desire for love and companionship, and strides in the education and human rights protections afforded to women. Polygyny is disadvantageous to women, and as such, has declined as women gain more rights and power in many parts of the world (Bailey & Kaufman, 2010).

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**CONCEPT CHECKS**

1. **Contrast a family of orientation and a family of procreation.**
2. **Provide an example of a nuclear family and an extended family.**
3. **What are several alternatives to monogamy?**
4. **Why have rates of polygamy declined in contemporary society?**

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# Glossary

family
: A group of individuals related to one another by blood ties, marriage, or adoption, who form an economic unit, the adult members of which are responsible for the upbringing of children. All known societies involve some form of family system, although the nature of family relationships varies widely. While the main family form in modern societies is the nuclear family, extended family relationships are also found.

kinship
: A relation that links individuals through blood ties, marriage, or adoption. Kinship relations are by definition part of marriage and family, but they extend much more broadly. While in most modern societies few social obligations are involved in kinship relations extending beyond the immediate family, in other cultures kinship is of vital importance to social life.

marriage
: A socially approved sexual relationship between two individuals. Marriage historically has involved two persons of opposite sexes, but in the past decade, marriage between same-sex partners has been legalized in a growing number of states and nations throughout the world. Marriage normally forms the basis of a family of procreation—that is, it is expected that the married couple will produce and bring up children.

nuclear family
: A family group consisting of two adults and dependent children.

extended family
: A family group consisting of more than two generations of relatives living either within the same household or very close to one another.

families of orientation

The families into which individuals are born. Also known as *families of origin*.

families of procreation

The families individuals initiate through marriage, cohabitation, or by having children.

matrilocal

Describes a family system in which the husband is expected to live near the wife's parents.

patrilocal

Describes a family system in which the wife is expected to live near the husband's parents.

monogamy

A form of marriage in which each married partner is allowed only one spouse at any given time.

polygamy

A form of marriage in which a person may have two or more spouses simultaneously.

polygyny

A form of marriage in which a man may simultaneously have two or more wives.

polyandry

A form of marriage in which a woman may simultaneously have two or more husbands.

# 2 THEORETICAL AND HISTORICAL PERSPECTIVES ON FAMILIES

**Review the development of sociological thinking about families. Learn how families have changed over the last 500 years, and the social and economic factors underlying these changes.**

The study of families and family life encompasses contrasting approaches. Many perspectives adopted even a few decades ago now seem dated and unconvincing in light of recent research and changes in the social world, including the 2015 legalization of same-sex marriage in the United States. Nevertheless, it is valuable to trace the evolution of sociological thinking before discussing contemporary approaches to the study of families. We discuss three of the main theories used to understand the contemporary family and then provide a historical context for understanding contemporary families.

## Sociological Theories of Families

### Functionalism

The functionalist perspective sees society as a set of social institutions that perform specific functions to ensure continuity and consensus. According to this perspective, families perform important tasks that contribute to society's basic needs and help perpetuate social order. Sociologists in the functionalist tradition regard the nuclear family as fulfilling specialized roles in modern societies. With the advent of industrialization in the late nineteenth century, families became less important as a unit of economic production and more focused on bearing, rearing, and socializing children.

According to U.S. sociologist Talcott Parsons, the two main functions of families are primary socialization and personality stabilization (Parsons

& Bales, 1955). Primary socialization is the process by which children learn their society's cultural norms and expectations for behavior. Because this process happens during early childhood, the family is the most important site for the development of the human personality. Personality stabilization refers to the role of the family in assisting adult family members emotionally. Marriage between two adults is the arrangement through which personalities are supported and kept healthy. In industrial societies, families may play a critical role in stabilizing adult personalities because the nuclear family is often geographically distant from its extended kin and cannot draw on larger kinship ties.

Functionalist theories emphasize how the family helps meet society's needs and maintain order. Functionalism viewed a strict division of labor—with men in an instrumental role and women in an affective role—as rational and functional for society.

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Parsons regarded the nuclear family as best equipped to handle the demands of industrial society. In the "conventional" family, one adult can work outside the home for pay while the second adult cares for the home and children. In practical terms, this specialization of roles has historically meant the husband adopts the "instrumental" role as breadwinner and the wife assumes the "affective," or emotional support, role in the home.

Today, Parsons's view of families seems inadequate and outdated. Functionalist theories of families have come under heavy criticism for justifying the domestic division of labor between men and women as something natural and unproblematic. Moreover, functionalist perspectives presume that a male-female married couple is essential for the successful rearing of children and the efficient operation of households; Parsons failed to consider that same-sex, trans, and single-parent families may run efficiently and effectively parent and socialize their children. He also failed to recognize that in many heterosexual marriages, wives may be better suited to breadwinning and their husbands better suited to child-rearing, or that the two would share both tasks equally. Many of these critiques are similar to those that sociologist Judith Stacey levied against conservative sociologist David Popenoe. Yet Parsons's theories are more understandable when we consider the broader historical backdrop. The immediate post–World War II years (when Parsons proposed his theories) saw men reassuming positions as sole breadwinners after returning from the war overseas; this arrangement was rational for the family because men typically earned far more than women (Becker, 2009). Because women were no longer needed in the labor force in large numbers, they returned to their traditional roles of wives, mothers, and homemakers after having worked in offices, factories, shipyards, and stores during the war when the men were away.

Assessing Parsons's view in light of contemporary society, however, we can criticize functionalist views on other grounds. In emphasizing the importance of the family, such theories neglect the role of other social institutions—such as government, media, peers, and schools—in socializing children. The theories also neglect family forms that do not reflect the nuclear family. Families that do not conform to the White, heterosexual, cisgender, suburban, middle-class ideal—including same-sex, child-free, and single-parent families, as well as families in which husbands are not primary breadwinners—are considered deviant.

## Symbolic Interactionist Approaches

Symbolic interactionist approaches to studying the family stand in stark contrast with functionalist perspectives. Whereas functionalist approaches emphasize stability and maintaining the current social order, symbolic interactionism emphasizes the contextual, subjective, and even ephemeral nature of family interactions, power relations, and

interpersonal communication (LaRossa & Reitzes, 1993). Sociologist Ernest Burgess (1926) was one of the earliest scholars to apply symbolic interactionist approaches to the family, which he described as "a unity of interacting personalities" in which the behavior or identities of individual family members mutually shaped one another over time.

Symbolic interactionist approaches do not take power differentials for granted, and they do not necessarily assume that men have more power than women or that adults have more power than children. For example, Willard Waller (1938) developed the principle of least interest to show that the partner who is least committed to, or interested in, the romantic relationship has more power and might often exploit that power. Think about some of the couples you know; your friend might be an independent and assertive person, but if they are very intent on making a relationship work with a partner who is slightly less excited about the relationship, your friend might cede the upper hand to the partner in an effort to keep the relationship going.

More contemporary work emphasizes the ways that family members continually negotiate, define, and redefine their roles. Recall from Chapter 10 the concept of "doing gender" (West & Zimmerman, 1987). In this view, the gendered ways that people behave are neither biological nor static; rather, these roles are socially constructed based on the immediate social context. Marriage and romantic relationships are a particularly important site of doing gender. Studies have explored the ways that couples negotiate housework and how they "do gender," even when no longer performing the household tasks typically associated with their sex. Carol Emslie and her colleagues (2009) studied the ways that colorectal cancer patients "did gender" when their illness prevented them from carrying out the gender-typed household roles they previously performed. The couples developed narratives to maintain their gendered identities, where women organized "cover" for housework and child care when they were ill, and men focused on making sure that their families were financially secure and spouses were "protected" from the stress of the men's cancer battles. "Doing gender" is not limited to straight married couples, however. In his study of same-sex couples, Christopher Carrington (1999) found that men in same-sex couples often "covered up" their role in serving nightly meals, as a way to reinforce their masculinity, whereas female partners claimed responsibility for meals, and in doing so reinforced their appearance of femininity.

Symbolic interactionist approaches have been applied to parent-child relationships as well. Whereas scholarship on functionalist traditions took a "top down" approach to socialization and presumed that parents taught and socialized their children, symbolic interactionist studies find that children often shape, influence, and guide their parents in particular social situations. Several recent studies of immigrant and refugee families, for instance, show that parents and children often must renegotiate their roles when they inhabit unfamiliar contexts (Katz, 2014). Children may have relatively higher status than their parents, especially if they have a better understanding of the language and practices in the United States. This knowledge allows them to serve as the family's liaison to schoolteachers and health care providers.

Symbolic interactionist scholars offer provocative insights into family dynamics, but this perspective is critiqued on the grounds that it places too much emphasis on cooperation and consensus. Other critics find that the perspective is overly descriptive; it tells us what is happening, but it does not tell us why. Finally, some scholars, especially those working in the feminist tradition, find fault with the perspective's lack of explicit attention to social structure and deeply embedded gender differences in social and interpersonal power.

## Feminist Approaches

For most people, families provide solace, practical support, comfort, love, and companionship. Yet families can also be sites of exploitation, loneliness, and profound inequality. In this regard, feminism has challenged the vision of families as harmonious and protective. In 1963, the American feminist Betty Friedan wrote in *The Feminine Mystique* of "the problem with no name"—the isolation and boredom of many suburban American housewives trapped in an endless cycle of child care and housework. Other writers followed, exploring the phenomenon of the "captive wife" (Gavron, 1966) and the damaging effects of "suffocating" family settings on interpersonal relationships (Laing, 1971).

During the 1970s and 1980s, feminist perspectives dominated debates and research on families. Where, previously, family sociology had focused on family structures, the historical development of the nuclear and extended family, and the importance of kinship ties, feminism directed attention inside family dynamics to examine women's

experiences in the domestic sphere. Many feminist writers questioned the vision of families as cooperative units based on common interests and mutual support, arguing instead that unequal power relationships within families meant that certain family members benefited more than others (Ferree, 2010).

Feminist approaches to understanding families focus on a broad range of topics, yet three are particularly important. The first is the division of household labor—the way in which tasks are allocated, where women often specialize in homemaking and child-rearing and men specialize in breadwinning in heterosexual marriages. Feminists disagree about the historical emergence of this division. Some see it as an outcome of industrial capitalism, where factory work would take men out of the home to work for pay (unlike in earlier agricultural economies) and women would be left to manage the home front. Others link it to patriarchy and thus see it as predating industrialization. Although a domestic division of labor probably did exist before industrialization, capitalist production caused a sharper distinction between the domestic and work realms. This process resulted in the crystallization of "male spheres" and "female spheres" and the power relationships that persist today. Some have argued that the gendered allocation of household roles is also a by-product of economic factors; men's earnings historically have outpaced women's, so the opportunity costs—or family wages lost—are lower when women reduce or abandon paid work for unpaid household labor (Stratton, 2012). Until recently, the male breadwinner model has been widespread in most industrialized societies.

Feminist sociologists have studied the way men and women share domestic tasks, such as child care and housework. They have investigated the validity of claims such as that of the "symmetrical family" (Young & Willmott, 1973)—the belief that, over historical time, family roles and responsibilities are becoming more egalitarian. Findings have shown that women still bear the main responsibility for domestic tasks and enjoy less leisure time than men, even though more women are working in paid employment outside the home than before (Bianchi et al., 2012). Data from the 2016 American Time Use Study showed that, on an average day, 21 percent of men did housework, such as cleaning or doing laundry, compared with 50 percent of women. Not only are men less likely to do housework, but when they do, they spend less time doing it—in 2016 they spent only about 30 percent of the time women spent (U.S. Bureau

of Labor Statistics [BLS], 2023p). Interestingly, in same-sex couples, partners tend to share housework more equally than do heterosexual couples, revealing the complex ways that gender shapes household arrangements (Goldberg et al., 2012).

A second theme is the unequal power relationships within many families, especially the phenomenon of domestic violence, including intimate partner violence. Spousal abuse, marital rape, incest, and the sexual victimization of children have all received more public attention as a result of feminists' claims that the violent and abusive sides of family life have long been ignored in both academic contexts and legal and policy circles. Feminist sociologists consider how the family serves as an arena for gender oppression and physical abuse. For example, through much of U.S. history, a husband had the legal right to engage his wife in coerced or forced sex. For most of the twentieth century, marital rape was considered an exemption to rape laws, although the exemption was repealed in all states as of 1993. Yet a dozen states still maintain laws that handle marital rape in quite different ways from rape outside marriage. Depending on the state, marital rape might be charged under a different section of the criminal code, restricted to a shorter reporting period, and held up to different standards and definitions of force and coercion; assailants are even given slightly different punishments (Byrne, 2015).

Care work constitutes a third theme that feminists address. This broad realm encompasses a variety of processes, from attending to a family member who is ill to looking after an older relative over a long period. Sometimes caregiving means simply being attuned to someone else's psychological well-being. Not only do women shoulder concrete tasks such as cleaning and child care, but they also invest significant emotional labor in maintaining personal relationships (Pinquart & Sorensen, 2006). While caring activities may be grounded in love and deep emotion, they also require an ability and willingness to listen, perceive, negotiate, and act creatively. Caring activities often involve long spells of unpaid labor, and these responsibilities often limit women's ability to work for pay outside the home. In these ways, caregiving indirectly contributes to women's relative economic disadvantage in society. Research shows persuasively that women's economic disadvantage relative to men, especially among older adults, is due in part to their tendency to cut back on paid work when caring for their families, thus reducing the pensions that they are entitled to in old age (Harrington et al., 2007). Critiques of

feminist theory emphasize that the focus on gender draws attention away from social-class influences, race differences, and other important sources of intersectionality.

## Contemporary Perspectives in the Sociology of Families

Recent theoretical and empirical studies conducted from a feminist perspective have generated increased interest in the family among both academics and the general population. Terms such as the *second shift*—referring to women's dual roles at work and at home—have entered our vocabulary. But because feminist studies often focused on issues within the domestic realm, they did not always address trends and influences outside the home.

Since the 1990s, an important body of sociological literature on the family has emerged that draws on feminist perspectives but is not strictly informed by them (see Table 15.1). Of primary concern are the larger transformations in family forms—the formation and dissolution of families and households and the evolving expectations within personal relationships. The rise in divorce and single parenting, the emergence of "reconstituted families" (i.e., remarriages), same-sex and trans families, the popularity of cohabitation and child-free families, and the diverse and dynamic nature of the households in which children are raised are all topics of inquiry.

In the years following the recession of 2007–2009 and the changes to everyday life during the Covid-19 pandemic, scholars have intensified their focus on shifting gender roles within families, where men's and women's "traditional" roles have converged or even crossed over. As the recession of 2007–2009 disproportionately struck "male" industries such as finance and manufacturing, increasing numbers of households were distinguished by breadwinner wives and dads who either stayed at home with children or juggled part-time work with child-rearing (Livingston, 2018). These patterns reversed once again during the pandemic, however. Women left the paid labor force in dramatically higher numbers than men did, as they struggled to balance working at paid jobs, homeschooling children, and maintaining their households during the tumultuous era (Stevenson, 2021).

**Table 15.1APPLYING SOCIOLOGY TO FAMILIES**

| CONCEPT | APPROACH TO UNDERSTANDING FAMILIES | CONTEMPORARY CONCEPT APPLICATION |
|---|---|---|
| **Functionalism** | Social institutions like families perform specific functions to ensure continuity and stability. | Conservative scholar David Popenoe argues that families function best when husbands work for pay and wives raise and socialize children. |
| **Symbolic interactionism** | Family relationships are contextual, subjective, and continually renegotiated. | Spouses develop narratives to maintain their gendered identities, even when illness prevents them from carrying out household tasks historically associated with their gender. |
| **Feminist theories** | Families are distinguished by unequal power relationships, such that some family members benefit more than others. | Because women have historically earned less than men, they are often burdened with emotion- and time-intensive unpaid caregiving labor in the home. |

Sociologists today are interested in transformations in family forms, including the rise in remarriage and emergence of blended families such as the Trumps.

# Historical Perspectives on Families

Historical lore and nostalgia tend to romanticize the ways families were in the past, erroneously characterizing highly interdependent extended families as the norm. However, the notion that the extended family was the predominant form of family in premodern eras has been disproved. Historical research shows that the nuclear family has long been preeminent. Throughout the seventeenth, eighteenth, and nineteenth centuries in the United States, the average household size was just 4.75 persons, often including domestic servants. The current average is 2.5, which isn't dramatically lower than the average household size several centuries ago (U.S. Bureau of the Census, 2017a). The smaller size today is largely due to the high proportion of Americans who live alone, especially older widowed women and young professionals who maintain their own homes (Klinenberg, 2012a).

Other historical research also challenges the idyllic image some hold of families in the days of yore. In the premodern United States and Europe,

children as young as seven or eight often worked, helping their parents on the farm. Most who did not remain in the family enterprise left the parental household at an early age to do domestic work for others or to follow apprenticeships. Children who went away to work rarely saw their parents again. Families also were unstable and impermanent then, as they are today (a theme we revisit later in this chapter). High mortality rates (numbers of deaths per 1,000 of the population in any one year) meant that a quarter or more of all infants in early modern Europe died within the first year of life, and women frequently died in childbirth. The notion of staying married until "old age" often was not realized due to mortality. The death of children or of one or both spouses often shattered family relations. Instability and severed ties have been permanent functions of family life throughout history, although the reasons may differ.

## The Historical Development of Family Life

The emotional and interpersonal nature of families has also shifted over time. Historical sociologist Lawrence Stone (1980) distinguished three phases in the development of the family from the 1500s to the 1800s. First, from the fifteenth century to the early seventeenth century, the main form was a type of nuclear family that lived in fairly small households but maintained deeply embedded relationships within the community, including with other kin. According to Stone (although some historians have challenged this idea), the family was not a major focus of emotional attachment or dependence for its members, as it is today. Individual freedom of choice in courtship, marriage, and other matters of family life were subordinated to the interests of parents, other kin, or the community. Sex within marriage was regarded not as a source of pleasure but as a necessity to produce children. Outside aristocratic circles, where it was sometimes actively encouraged, passionate or romantic love was regarded by moralists and theologians as a sickness. As Stone (1980) put it, the family during this period "was an open-ended, low-keyed, unemotional, authoritarian institution. . . . It was also very short-lived, being frequently dissolved by the death of the husband or wife or the death or very early departure from the home of the children."

The second phase was a transitional form of family that lasted from the early seventeenth century to the beginning of the eighteenth. Although largely a feature of the upper classes of society, this form was very important because from it spread attitudes that have since become almost

universal. The nuclear family became a more separate entity, distinct from other kin and the local community. There was a growing emphasis on marital and parental love, although the authoritarian power of fathers also increased.

The third phase, which emerged in the mid-eighteenth century and persisted through the mid-twentieth century, gave rise to the type of family system currently widespread in the West. This family is a group tied by close emotional bonds, domestic privacy, and child-rearing. It is marked by affective individualism (a belief in romantic attachment as the basis for marriage), courtship and marriage based on personal choice, and sexual attraction or romantic love. Sexual aspects of love became glorified within marriage instead of in extramarital relationships. The family became geared to consumption rather than production as a result of workplaces being separate from the home. Women became associated with domesticity and men with being the breadwinners. Originating among affluent groups, this family type became fairly universal in Western countries with the spread of industrialization.

In premodern Europe, marriage usually began as a property arrangement. In the middle years of marriage, the couple focused mainly on raising children, whereas in the later stages, marriage was about love. Few couples married for love, but many grew to love each other as they jointly managed their household, raised their children, and shared a lifetime of experiences together. By contrast, in most of the modern West, marriage begins with a couple in love; in its middle, it is mostly about raising children (if there are children), and marital quality wanes. By later life, couples whose marriages survive typically experience high levels of love, affection, and companionship (Karney & Bradbury, 1995; Umberson et al., 2005).

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## CONCEPT CHECKS

1. **According to the functionalist perspective, what are the two main functions of the family?**
2. **How do symbolic interactionist approaches to studying family differ from functionalist approaches? What are two critiques of the symbolic interactionist perspective?**
3. **According to feminist perspectives, what three aspects of family life are sources of concern? Why are these three aspects**

**troubling to feminists?**

4. **What characteristics distinguished the three historical stages of family development, as articulated by historical sociologist Lawrence Stone?**

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# Glossary

primary socialization
: The process by which children learn the cultural norms and expectations for behavior of the society into which they are born. Primary socialization occurs largely in the family.

personality stabilization
: According to the theory of functionalism, the family plays a crucial role in assisting its adult members emotionally. Marriage is the arrangement through which personalities are supported and kept healthy.

affective individualism
: The belief in romantic attachment as a basis for contracting marriage ties.

# 3 RESEARCH ON FAMILIES TODAY

**Learn about patterns of dating, cohabitation, marriage, same-sex unions, childbearing, divorce, remarriage, and child-free families. Analyze how these patterns today differ from those of other periods. Understand race, ethnic, and social-class differences in contemporary families.**

Contemporary research on family formation and family life, both in the United States and worldwide, is unified by four key themes. First, family structure continues to change and evolve. Second, there is tremendous variation in what families look like; our family experiences are powerfully shaped by our social group memberships, including race, social class, religion, sexual orientation, and age. Third, families are an important influence on the health and well-being of both adults and children. And, fourth, while families have been historically thought of as a safe haven, they also have a dangerous side where family members may inflict abuse and pain on one another. We review recent research on the current state of families and suggest ways they may change in future decades.

## Changes in Family Patterns Worldwide

A mural in Guangzhou, China, advertises the country’s one-child policy—a population control policy instituted in the late 1970s. As of 2021, couples can now have three children.

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Many family forms exist today. In some areas, such as remote regions in Asia, Africa, and the Pacific Rim, traditional family systems are changing slowly, with most still maintaining or aspiring to one lifelong marriage with children. In most wealthy countries, however, changes are occurring rapidly. In some nations in Western and Northern Europe, for instance, only a minority will ever marry, with most preferring to cohabit with their romantic partner. Among the complex origins of these changes is the spread of Western ideals of romantic love. Another is the development of centralized government in areas previously comprising autonomous smaller societies. People’s lives become influenced by their involvement in a national political system; moreover, governments attempt to alter traditional ways of behavior. Because of rapid population growth, states frequently introduce programs advocating smaller families, the use of contraception, and so forth. Finally, and perhaps most importantly, employment opportunities away from the land and in organizations such as government bureaucracies, mines, plantations, and industrial firms disrupt family systems previously centered on landed production in the local community.

These changes have created a worldwide movement toward the predominance of the nuclear family, breaking down extended-family systems and other types of kinship groups. This movement was first documented by William J. Goode in his book *World Revolution in Family Patterns* (1963) and has been borne out by subsequent research. Building on Goode's work, sociologists have identified seven important changes that have characterized global family change over the past half century:

1. Clans and other kin groups are declining in influence.
2. There is a general trend toward the free choice of a spouse or romantic partner.
3. The rights of women are more widely recognized, with respect both to initiating marriage and to making decisions within families.
4. Kin marriages are less common.
5. Higher levels of sexual freedom are developing in societies that were formerly very restrictive.
6. Birthrates are declining, meaning that women are giving birth to fewer babies.
7. There is a general trend toward extending children's rights.

In many countries, especially Western industrial societies, five additional trends have occurred within the past four decades:

1. The number of births that occur outside marriage has increased.
2. Laws and norms regarding divorce have liberalized.
3. Nonmarital cohabitation among romantic partners has increased.
4. The average ages at which people first get married and first give birth have increased.
5. Same-sex couples have gained cultural and legal acceptance, and their numbers are growing.

Countries vary widely in how rapidly these changes are occurring (Ng, 2016). For instance, most nations in Asia are witnessing a rapid transition in family life, with divorce rates rising, family size decreasing, and multigenerational families declining in number, a function of young adults' desire for autonomy and independence, and rejection of Confucian values (Ng, 2016). For instance, the divorce rate in Japan increased 66 percent between 1980 and 2012, while the rate in the United States decreased by roughly 25 percent during that period (Organisation for Economic Co-operation and Development, 2019). Currently, divorce rates in the United States are higher than in Japan (2.9 versus 1.7 per

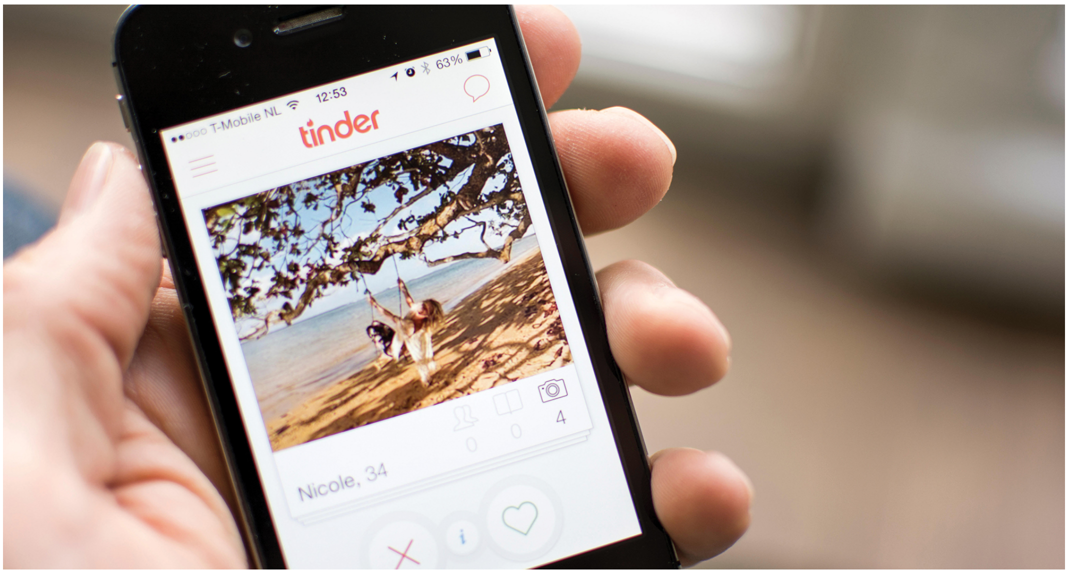
1,000 population). Other nations are witnessing dramatic shifts in the types of unions young adults enter. Only a minority of young adults ultimately marry in Scandinavian nations; they instead form long-term cohabiting relationships in which they bear and rear children. In 2014, fully 70 percent of births in Iceland were to unmarried parents; rates were just slightly lower in Sweden and Norway. However, nearly all these births were to cohabiting partners in committed long-term relationships (Chamie, 2017). Nonetheless, cohabiting unions are more likely than marital unions to dissolve—both in Europe and the United States—lending some instability to the lives of children born or adopted into those unions (Wilcox & DeRose, 2017).

# Dating and Courtship

"Reality" TV shows like *Married at First Sight* and *90 Day Fiancé* would have us believe that people jump into marriage shortly after meeting, perhaps after a brief and passionate whirlwind romance. Yet most couples take the leap into cohabitation or marriage after a lengthy period of dating or courtship, in which they get to know each other before committing to a lifetime together. Courtship might include activities like dating where couples or groups get together for shared activities like dinner, movies, parties, or sporting events. But dating is more than just recreation; this is the process through which romantic partners learn about each other's personalities, values, goals, and foibles, and become acquainted with their partner's family members who may eventually become in-laws (Weigel, 2017). Modern romantic relationships can begin and develop without face-to-face contact, as we saw in the popular reality show *Love Is Blind*, due in part to apps like Tinder and Bumble, which allow singles to find a partner whom they find attractive without having to rely on traditional means like parties, bars, or blind dates. Virtual dating, sending text messages, instant messaging, writing emails, or video-chatting through Zoom or FaceTime are modern ways that partners use to get to know each other (Rosenfeld, 2018). Online dating and even online dates became the only option for young singles when stay-at-home orders were in place during the 2020 pandemic (Vinopal, 2020).

Dating and courtship are taken-for-granted experiences for young people today, but the romantic notion of choosing one's own life partner based on physical attraction, personality compatibility, and the feeling of having

found one's "soul mate" is a very modern and Western phenomenon (Weigel, 2017). Arranged marriages were the norm in most parts of the world until the eighteenth century and largely disappeared from Western industrialized nations as the values of individualism and personal autonomy flourished (Coontz, 2006). However, arranged unions are still the norm in many parts of the world, especially South Asia. Family members, typically parents, select the young person's romantic partner, occasionally with the assistance of a professional matchmaker. The reasons for arranged marriage vary across time and place, but some of the most common reasons are wealth and inheritance concerns, cultural or religious tradition, and the desire to ensure that one's child marries a person of their own ethnic, racial, or religious group.




Dating apps like Tinder allow people to develop romantic relationships without having face-to-face contact.

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Scholars have asked the important question of whether arranged or autonomous ("love") marriages are more successful, and they do not have definitive answers. The evidence generally shows that in arranged marriages, love and friendship can emerge over time, and that autonomous marriages have no guarantee that the love and romance will persist—as evidenced by high rates of divorce in wealthy Western nations. In other words, there's no guarantee that any type of romantic union will be happy and harmonious forever, regardless of one's pathway into that union (Epstein et al., 2013). Feminist scholars have also pointed out that young women manage to exert some choice and creatively

navigate the process of arranged meetings with potential spouses (Pande, 2015).

Even in the contemporary United States, the ways that young people meet and interact with romantic partners have shifted dramatically over the past century. It was only in the early twentieth century that dating emerged as a “fun” activity that was considered a normal stage of adolescence and early adulthood. However, dating in the 1920s and 1930s was more chaste than it is today; premarital sex was frowned upon, so couples progressed very quickly from dating to marriage. Following the sexual revolution of the 1960s and 1970s, premarital sex became more widely accepted, so dating couples could enjoy sexual relationships without rushing into marriage as a way to consummate their relationship (Coontz, 2006). Today, young people may “hook up” with a sexual partner or “hang out” with large groups of friends rather than go on traditional “dates” like dinner and a movie (Garcia et al., 2012). Although some scholars and conservative pundits have argued that casual sexual relationships or “hookups” are demeaning and demoralizing to young people (especially heterosexual women), other researchers suggest that these relationships allow young people to focus on their career goals, without concerns that they will be tied down by a partner (Armstrong & Hamilton, 2015). Moreover, “hookup” or “friends with benefits” relationships often do progress into more long-lasting unions. One study found that fully half of all college students’ committed dating relationships began as a “hookup” (Bogle, 2007).

An additional consequence of rising levels of individualism over the past century is that young people feel less constrained to date partners who share the same ethnic, racial, or religious background as their parents or grandparents. Adolescents and young adults also are more likely than past generations to try same-sex dating; one recent study of 24,000 college students found that 25 percent of women and 12 percent of men who identified as “heterosexual” had their most recent hookup with a partner of the same sex (Kuperberg & Walker, 2018). However, sociologists are careful to point out that young people’s latitude in choosing whom to date is shaped by social context, such that LGBTQ+ youth are more comfortable “coming out” and dating same-sex partners in schools with more accepting climates and fewer practices that uphold heteronormativity, like a strong “football culture” (Wilkinson & Pearson, 2009).

Similarly, interracial dating is more common in schools that are racially and ethnically diverse (Kao et al., 2019). Grace Kao and colleagues (2019) analyzed data from the National Longitudinal Study of Adolescent to Adult Health, a survey of more than 15,000 middle and high school students in the mid-1990s and tracked them over the next 15 years. They concluded that "giving young people the opportunity to interact with individuals of different races is essential to promoting interracial friendships and romantic relationships. A lot of sociologists . . . believe that individual characteristics—education, income level, etc.—make people more likely to have interracial . . . romances, but we found that the positive association of simply attending a diverse school outweighs those other factors" (Cummings, 2019). Taken together, these studies powerfully show that our dating lives, something we think of as being guided solely by our own romantic tastes, are highly structured by the environments in which we live and interact.

# Family Formation and Dissolution Trends in the Contemporary United States

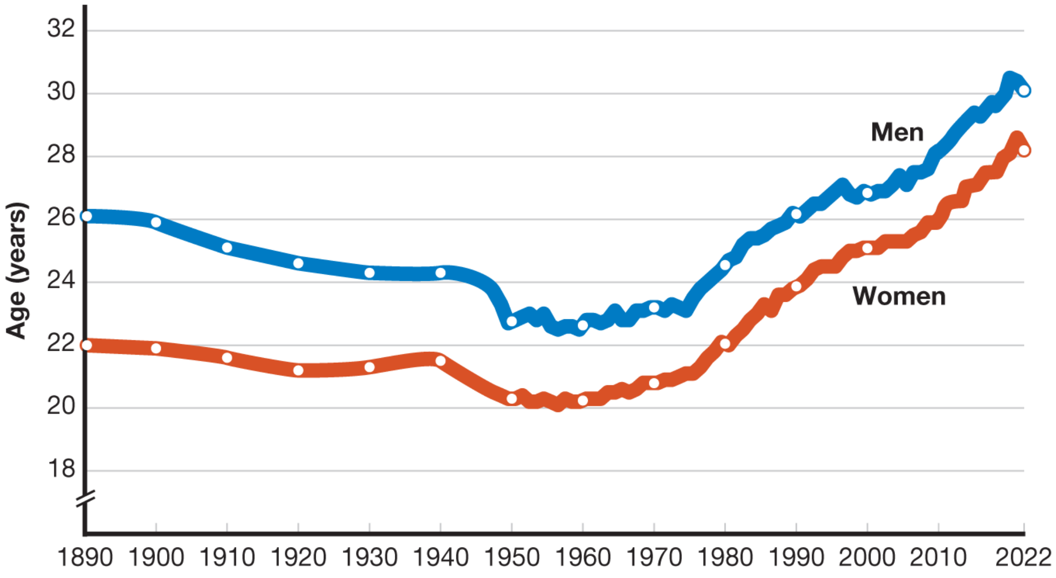
Given the ethnic, racial, and cultural diversity of the United States, there are considerable variations in family and marriage within our country. Most research on families in the United States compares broad racial groups as defined by the U.S. Census: White, Black, Asian, and Native American, as well as persons with Hispanic ethnicity, regardless of race (see Chapter 11). However, as we shall see below, intermarriage, or marriage between two persons of different racial backgrounds, has grown increasingly common over the past two decades. Most research shows quite striking differences in the marriage and childbearing patterns of White and U.S.-born Black families; Asian American families resemble Whites in many ways, while patterns among persons of Hispanic origin and Black immigrants are highly varied based on their particular culture or country of origin. These differences reflect long-standing economic and historical factors that shape family formation. After considering these differences, we will examine divorce, remarriage, stepparenting, and childbearing in relation to contemporary patterns of family life.

The United States has long had high marriage rates; roughly 90 percent of adults 60 and older today are married or have previously been married (Gurrentz & Mayol-Garcia, 2021). However, recent evidence shows that the age at which Americans marry for the first time has risen sharply in recent decades, leading researchers to debate whether marriage is simply being delayed or is being forgone altogether. In 2022, the median age at first marriage in the United States was 28.2 for women and 30.1 for men; this marks a dramatic increase from 1947, when the median ages were 20.5 and 23.7, respectively (see Figure 15.1) (U.S. Bureau of the Census, 2022d). Sociologists offer several explanations for this trend.

First, some researchers contend that increases in cohabitation among younger people account for the decrease (or delay) in marriage among this group. In past decades, young people who wanted to live with their romantic partner typically got married, given the stigma associated with "living in sin" and having sexual relations with a person to whom one was not legally married. Within the past four decades, however, cohabitation has grown exponentially in popularity among young adults, alongside the disappearing stigma of premarital sexual relations. Cohabitation is also increasingly popular among older adults, and nonmarital cohabitation is replacing remarriage as the main way that midlife and older adults repartner following divorce (Brown & Wright, 2017). In 2007, the Current Population Survey (CPS), a national survey of U.S. adults, introduced a measure that identifies all cohabiting partners in a household (Kennedy & Fitch, 2012). Because the practice and formal measurement of cohabitation are relatively new, it is not easy to make direct comparisons with much earlier time periods. Nonetheless, we can estimate that the number of younger-age couples who have ever lived together without being married has risen steeply from half a million couples around 1970 to almost 3 million in 1990. By 2016, more than 8 million couples were cohabiting in the United States (U.S. Bureau of the Census, 2017e). Among young adults ages 18 to 24, cohabitation is now more common than living with a spouse: 7 percent of men and 11 percent of women lived with an unmarried partner in 2021, compared to 5 percent and 8 percent who lived with a spouse (Brown & Manning, 2021).

Figure 15.1

**MEDIAN AGE AT FIRST MARRIAGE, 1890–2022**




Source: U.S. Bureau of the Census, 2022d.

Others argue that increases in postsecondary school enrollment, especially among women, are partially responsible. Most couples prefer to delay marriage until they have completed their formal schooling (Wang & Parker, 2014). That's part of the reason why marriage has become an institution of social and economic advantage; young adults with higher levels of education and income are more likely than those with fewer economic advantages to transition from cohabitation to marriage (Gurrentz, 2018). Not only does it cost money to have a wedding, but young people believe that economic security is a prerequisite for marrying and may wait until they graduate, find a secure job, and pay off college loans (Sassler et al., 2018). Similarly, women's increased participation in the labor force means many women establish careers before getting married and starting a family (Copen et al., 2012).

Finally, some researchers believe that modernization and a secular change in attitudes promote individualism and downplay the importance of marriage. According to this perspective, young people are not just delaying marriage but may forgo marriage altogether. As we will see later in this chapter, cohabitation has surpassed marriage in popularity in some Western and Northern European nations. Sociologists do not predict a parallel trend in the United States, where well over half of unmarried young adults say that they do want to marry someday (Wang & Parker, 2014). However, according to Census Bureau predictions, a sizeable proportion of millennials will remain unmarried for life, with this pattern

especially common among those with fewer financial advantages (Wang & Parker, 2014).

The actual reason for the delay in marriage and accompanying decline in marriage rates is likely a combination of economic, social, and cultural factors. Still, we must be careful in drawing the conclusion that Americans are turning their back on marriage. Although some social critics have argued that the trend toward marriage later in life is a break from tradition, the age of first marriage in the United States is now more similar to what it was between 1890 and 1940 and departs markedly only from the very low ages of first marriage in the mid-twentieth century. In 1890, the median age at first marriage for men was 26, lower than the median age of 30 today, but still a far cry from the 1950s, when marriage happened in one’s very early twenties (U.S. Bureau of the Census, 2022d). The assumption that people today are postponing marriage dramatically is true only if we compare ourselves with Americans in the 1950s. It might be more accurate to say that the 1950s generation married at an unusually young age.

No one knows how the trend toward cohabitation will develop in the future, but we can get useful information from other industrial countries. In France, Sweden, and other nations where cohabitation is as widespread as marriage, many people, especially younger adults, view the two as interchangeable (Treas et al., 2014). By contrast, in the United States, only two-thirds of those cohabiting say that their relationship is a precursor to marriage (Pew Research Center, 2011b). And plans to marry don’t always lead to a walk down the aisle; sociologist Karen Guzzo (2009) found that one-quarter of cohabiters who were engaged or planned to marry ended up changing their minds or ending their unions. We return to the topic of cohabitation as an alternative to marriage later in this chapter.

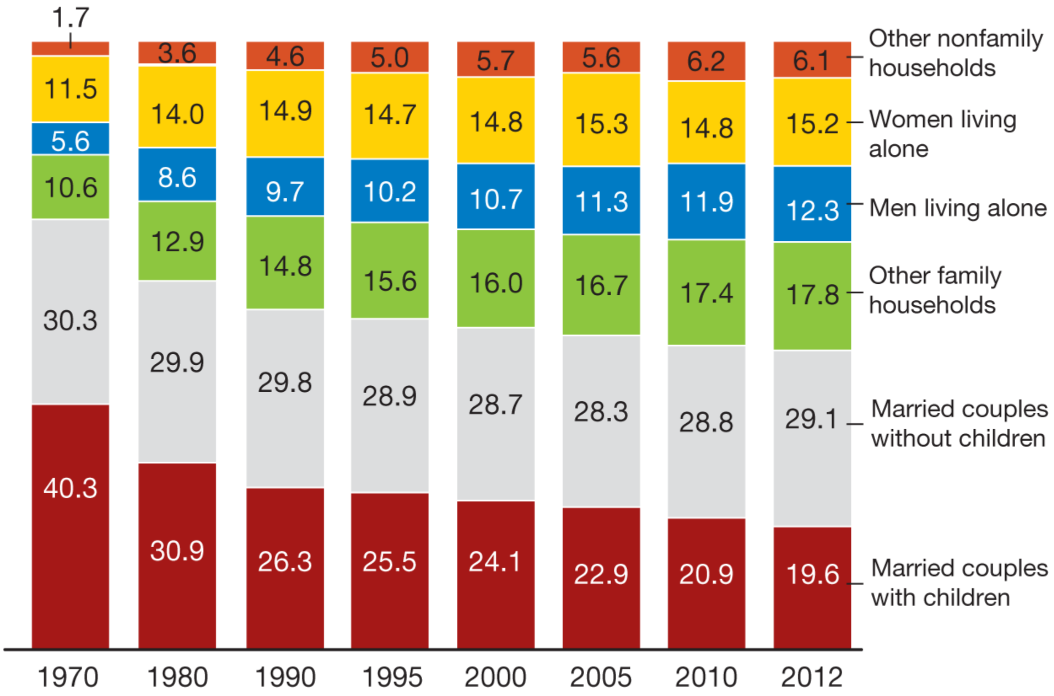
An extraordinary increase in the proportion of people living alone in the United States has taken place recently—a phenomenon that partly reflects the high levels of marital separation and divorce. More than one in every four households (28 percent) in 2016 consisted of one person, more than twice the proportion (13.1 percent) in 2021 (U.S. Bureau of the Census, 2021d). There has been a particularly sharp rise for individuals living alone in the 24 to 44 age bracket.

As we noted in this chapter’s introduction, some people still think the “average” American family consists of a husband who works in paid employment and a wife who looks after the home and their two children. However, less than a quarter of married couples with children under 15 fit this picture (U.S. Bureau of the Census, 2016a; see Figure 15.2). One reason is the high and stable divorce rate: A substantial proportion of the population lives either in single-parent households or in stepfamilies, or both. Another is the high proportion of women who work. Dual-career marriages and single-parent families are now the norm. Although men historically were the only breadwinner or the higher earner in the marriage, this pattern is rapidly changing; women outearn their husbands in 29 percent of households today (U.S. Bureau of the Census, 2019a).

There are also significant differences in patterns of childbearing between parents in the 1950s and later generations. The birthrate rose sharply just after World War II and again during the 1950s. Women in the 1950s had their first child earlier than later generations did, and subsequent children were born closer together. Since the late 1960s, the average age at which women have their first child has risen steadily. In 2015, the average age of first-time moms was 26.4, up from 22.1 in 1970. The proportion of women giving birth in their thirties and forties also has increased sharply. In 1976, only 20 percent of births were to women over age 30. By 2015, this proportion had grown to 44 percent (Martin et al., 2017). Specifically, the first birthrates for women between the ages of 35 and 39 have increased dramatically since the early 1970s, jumping more than sixfold (Mathews & Hamilton, 2014). Delayed childbearing, like delayed marriage, is due largely to rising levels of education and greater career opportunities for women today, relative to five decades ago.

Figure 15.2

**HOUSEHOLDS BY TYPE, 1970–2012**




Source: Vespa et al., 2013.

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Family structures and patterns are powerfully shaped by both structural and cultural factors. Structural factors—including shifts in educational attainment, economic prospects of young adults, widening levels of income inequality, and whether one has the legal right to marry—have a powerful influence on the ways families are formed. At the same time, cultural factors, ranging from attitudes toward marriage, sexuality, and cohabitation to beliefs about the appropriate context for raising children, shape family lives. For these reasons, American families vary widely based on factors such as social class, race, ethnicity, religion, sexual orientation, and even the geographic region where they live. We briefly focus on the ways that race and social class shape family life in the contemporary United States.

## Race, Ethnicity, and American Families

Sociologists have documented stark differences in family structure among White, Black, Native American, Asian, and Hispanic-origin families. Early studies failed to consider distinctions between race and ethnicity (lumping together, for instance, U.S.-born and non-U.S.-born Blacks) and attributed Black-White differences in family structure to

“cultural” differences, including beliefs about the importance of marriage and about the importance of being economically self-sufficient (Lewis, 1968). However, in recent decades, scholars have moved away from “cultural” approaches and instead recognize the critical importance of structural factors, acknowledging that socioeconomic resources, including education and the opportunity to work in jobs that provide a living wage and enable people to amass savings, are among the key factors that contribute to differences in family structure—most notably, the greater tendency of Whites and Asians (relative to Blacks, Hispanic-origin persons, and Native Americans) to marry, to remain married, and to have children within marriage. However, as we have seen elsewhere in this book, race and socioeconomic status are so closely intertwined in the United States that it is difficult to parse the distinctive effects of one over the other. Another advance in recent years is attention to multiracial families; younger cohorts are far more likely than their parents to date and marry persons of a different race. One in six recent newlyweds married persons of a race different from theirs, shedding light on the increasingly complex ways that race shapes family experiences in the United States (Livingston & Brown, 2017).

**Native American Families** Kinship ties are very important in Native American families. As family scholar Andrew Cherlin (1999) notes, “Kinship networks constitute tribal organization; kinship ties confer identity” for Native Americans. However, for those who live in cities or away from reservations, kinship ties may be less prominent. Furthermore, Native Americans have higher rates of intermarriage than any other racial or ethnic group. According to 2013 American Community Survey data, fully 58 percent of all newlywed Native Americans married non-Natives. By way of comparison, just 11 percent of Whites, 18 percent of Blacks, 29 percent of Asians, and 27 percent of Hispanics who married in 2015 wed a partner of a different racial background (Bialik, 2017).

Native American women have a low overall birthrate, but a high percentage of these births occur outside marriage. At 50.8 babies per 1,000 women ages 15 to 44, it was the lowest of any ethnic group in the United States in 2021 (National Center for Health Statistics, 2023), a drastic change from 25 years ago, when the 1990 birthrate of Native American women was 19 per 1,000 women—one of the highest rates in the United States (Martin et al., 2017). However, compared to all U.S. women, a high proportion of Native American births were to women

under age 20 (11 percent compared to 6 percent for women of all ethnicities). Native American women also have their first children at a younger age; as a group, they have the youngest mean age at first birth at just over 23. Furthermore, nearly 66 percent of all Native American women giving birth in 2015 were not married (Martin et al., 2017). Gary Sandefur and Carolyn Liebler (1997) also report a high divorce rate for Native Americans, who, in addition, are at particularly high risk of domestic violence. Yet, as we will see later in this chapter, family violence can afflict persons of any ethnicity (Williams, 2012).

**Hispanic and Latinx-Origin Families** Persons of Hispanic and Latinx origin vary widely with respect to culture, history, and socioeconomic status, and consequently also are heterogeneous when it comes to family patterns. Mexicans, Puerto Ricans, and Cubans are three of the largest Hispanic subgroups. In 2021, Mexicans constituted nearly 60 percent of the Hispanic population, Puerto Ricans constituted 10 percent, and Cubans were just 4 percent; the rest of the Hispanic population was made up of much smaller groups from many Latin American nations (Krogstad et al., 2022). Overall, recent cohorts of Latinx persons are among the most likely of all ethnic groups to marry someone of a different ethnicity. In 2015, fully 27 percent of Hispanic-origin persons (regardless of ethnicity) married someone who does not identify as Hispanic origin, with men and women equally likely to out-marry.

Like many Mexican American families, the Camargo household contains multiple generations, including Beatriz Camargo and her husband and three kids, Beatriz's parents, her two brothers, and her sister.

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Mexican American families often live in multigenerational households and have a high birthrate. Economically, Mexican American families are more successful than Puerto Rican families but less so than Cuban families. Defying cultural stereotypes of a Mexican American home with a male breadwinner and female homemaker, almost 60 percent of all Mexican American women are in the labor force (Mejia, 2021). However, this situation is due to necessity rather than desire. Many Mexican American families would prefer the breadwinner-homemaker model but are constrained by finances (Hurtado, 1995).

Family members from Mexico and other Central American nations, including Guatemala and El Salvador, often must grapple with separation from one another. Often, family members will migrate to the United States sequentially, where one person (usually the father) secures a job and sends money, or "remittances," back to their family. The plans for the rest of the family to move to the United States and reunite are often delayed or halted due to immigration laws (Smokowski & Bacallao, 2011). Even after family members arrive, those who are undocumented may risk deportation, again causing family separation (Chang-Muy, 2009). Undocumented families faced particular uncertainty and turmoil under the Trump administration; during just a two-month period in 2019, Immigration and Customs Enforcement (ICE) removed roughly 1,000 migrant children from their families, often for reasons as minor as a parent having a traffic citation (Jordan, 2019). The short- and long-term effects of separation and parental deportation for a child's emotional, physical, and cognitive well-being are dire (Allen et al., 2015; Capps et al., 2007).

The case is very different for Puerto Ricans, because Puerto Rico is a U.S. commonwealth. Because of their status as U.S. citizens, Puerto Ricans move freely between Puerto Rico and the mainland without the difficulties immigrants encounter. When barriers to immigration are high, only the most able (physically, financially, and so on) members of a society can move to another country; because Puerto Ricans face fewer barriers, even the least able can manage the migration process. Thus, they

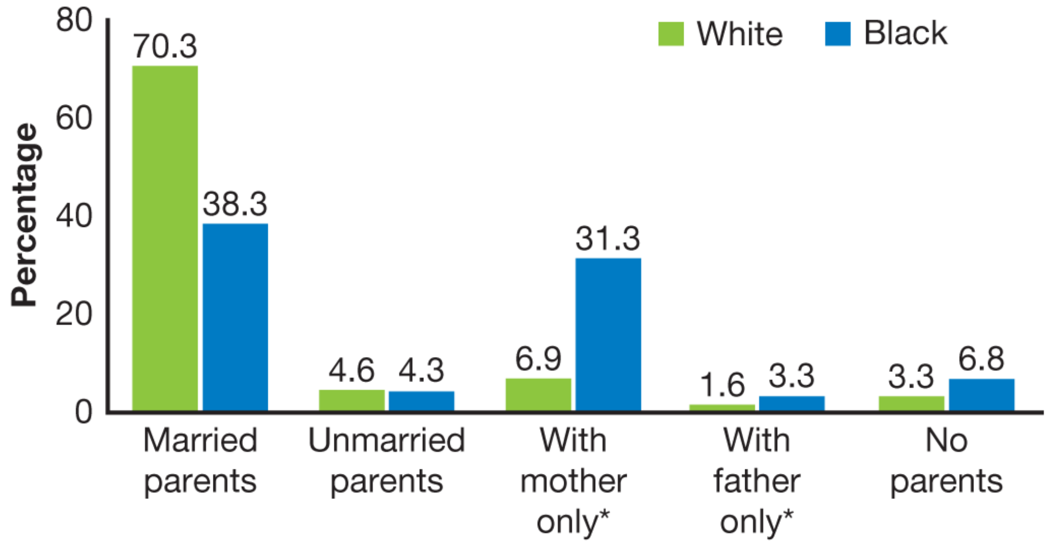
are the most economically disadvantaged of all the major Hispanic groups in the United States. Puerto Rican families have a higher percentage of children born to unmarried mothers than any other Hispanic group—the rate was 70 percent in 2020 (Kids Count Data Center, 2023). Only African Americans (70 percent) and Native Americans (69 percent) have higher rates of births to unmarried women (Osterman et al., 2023). However, consensual unions—cohabiting relationships in which couples consider themselves married but are not legally married—are often the context for births to unmarried mothers. Nancy Landale and Kelly Fennelly (1992) studied the marital experiences of Puerto Rican women and found that many lived in consensual unions. They suggest that Puerto Ricans may respond to tough economic times by forming consensual unions as the next best option to a more expensive legal marriage.

Cuban American families are the most prosperous of all the Hispanic groups but are less prosperous than Whites. Cuban Americans historically have settled in the Miami area, forming enclaves in which they rely on other Cubans for their business and social needs (such as banking, schools, and shopping). The relative wealth of Cuban Americans is driven largely by family business ownership. In terms of childbearing, Cuban Americans have lower levels of fertility than non-Hispanic Whites and equally low levels of nonmarital fertility, suggesting that economic factors are equally important as, if not more important than, cultural factors in shaping family lives in the United States.

**Black Families** Black Americans are a diverse group, including those who have lived in the United States for generations, as well as more recent migrants from Africa, the Caribbean, and Latin America (Anderson, 2015). Most of what we know about Black families in the contemporary United States is based on U.S.-born Blacks whose family lives have been shaped by the legacy of slavery (Wilson, 1987). However, in recent years scholars have pointed out stark differences in the marriage and family formation patterns of U.S.-born and immigrant Blacks.

Figure 15.3

**LIVING ARRANGEMENTS FOR WHITE AND BLACK CHILDREN, 2021**




*Note that these data are for a parent that was never married.

Source: U.S. Bureau of the Census, 2021d.

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U.S.-born Black and White families differ dramatically in terms of family makeup, although these differences are largely attributable to structural factors, including economic resources that facilitate marriage and marital stability. Blacks have higher rates of childbearing outside marriage, are less likely ever to marry, and are less likely to marry after having a nonmarital birth (**Figure 15.3**). These differences are of particular interest to sociologists because single parenthood in the United States is both a cause and consequence of poverty (Harknett & McLanahan, 2004).

The contemporary state of U.S.-born Black families has deep historical roots. One of the first sociological analyses was carried out by E. Franklin Frazier, in his 1939 book *The Negro Family in the United States*. Frazier examined how historical factors such as slavery, racism, urban migration, and economic adversities affected families. Frazier's work has been critiqued by feminist scholars, among others, who believe he subtly blames problems facing U.S.-born Blacks (e.g., youth crime) on female-headed households, absentee fathers, and nonmarital births, and that he suggests that the two-parent nuclear family is the ideal. Yet other contemporary scholars laud his work for showing that Black families are highly diverse and are resilient against a historical backdrop of deeply entrenched and systemic racism (e.g., Semmes, 2001).

Three decades after Frazier published his trailblazing work, Senator Daniel Patrick Moynihan (1965) described Black families as “disorganized” and caught up in a “tangle of pathology.” Moynihan, too, referenced historical factors shaping experiences of Black families. For instance, he noted that the circumstances of slavery prevented Blacks from maintaining the cultural customs of their societies of origin. Slave owners often regarded them as little better than livestock and as inherently promiscuous and, therefore, unworthy of marriage. After emancipation, new cultural experiences and structural factors threatened Black families. Among these were new forms of racial discrimination, changes in the economy such as the development of sharecropping in the South after the Civil War, and the migration of Black families to northern cities early in the twentieth century (Jones, 1986).

A persistent puzzle facing researchers is the question of why Black and White family patterns have diverged even further since the 1960s, when Moynihan’s study was published and public benefits for poor families were expanded dramatically as part of President Lyndon B. Johnson’s Great Society program with the goal of minimizing poverty and eradicating racial injustice. We focus on contemporary factors that have contributed to the increasingly large gap in the structure of Black and White families. In 1970, 33 percent of African American families with children under age 18 were headed by single mothers; the comparable rate among White families was 9 percent (U.S. Bureau of the Census, 2017d). By 2020, the proportion of Black families with children under 18 headed by single mothers had risen to nearly 50 percent, while the comparable proportion for White families was 13 percent. In addition, fewer Black families are maintained by a married couple: In 2020, 38 percent of Black families included a married couple, compared to 76 percent of White families (Hemez & Washington, 2021).

One social condition that contributes to high rates of nonmarital childbearing (and, consequently, female-headed households) is what sociologist William Julius Wilson (1987) calls a shortage of “marriageable” Black men, a function of Black men’s high rates of incarceration, unemployment, and underemployment. Marriage opportunities for women are constrained if there are not enough men employed in the formal labor market. A woman is less inclined to marry a man who is not earning a living wage, and may instead opt to have and raise a child on her own, rather than enter a marital union marked by

financial instability. Wilson's argument rests on the assumption that Black heterosexual women exclusively marry Black heterosexual men, an assumption that has become less defensible over time. In 1980, just 5 percent of Black newlyweds were married to a person of a different race; by 2015, this proportion jumped to 18 percent (Livingston & Brown, 2017). However, there is a vast gender disparity such that Black men are more than twice as likely as Black women to out-marry; in 2015, just 12 percent of newlywed Black women but fully 24 percent of newlywed Black men had married a partner of a different racial background. Taken together, these trends have been cited for Black women's low rates of marriage relative to their White peers; one analysis found that just 7 percent of 40-year-old White women but 34 percent of 40-year-old Black women had yet to be married by age 40 (Raley et al., 2015).

Contemporary research provides some support for Wilson's "marriageable male" hypothesis. Recent research confirms that one of the best predictors of whether parents marry after a nonmarital birth is the availability of eligible partners in a geographic area (Harknett & McLanahan, 2004), demonstrating the continued importance of marriage markets even after the birth of a child. However, as we shall see in the section that follows, the patterns that Wilson documented are largely limited to lower-income African Americans; middle-class Blacks reveal family patterns that are very similar to Whites.

African Americans are often embedded in larger and more complex family networks than Whites, but these ties are a source of both support and strain. Anthropologist Carol Stack (1997) lived in a low-income Black community in Illinois to study the support systems that poor Black families formed. Getting to know the kinship system from the inside, she demonstrated that families adapted to poverty by forming large, complex support networks. Thus, a mother heading a one-parent family is likely to have a close and supportive network of relatives to depend on. Yet these family ties often come with demands—especially on older African American women, who are more likely than any other group to live with and raise their grandchildren. They step into this role when their own children can no longer adequately fulfill their parenting role (Hughes et al., 2007).

Most research on Black families to date focuses on U.S.-born African Americans. However, emerging research shows vast differences in the experiences of U.S.-born and immigrant Blacks in the United States. For

instance, among Black adults ages 18 and older in 2013, just 28 percent of U.S.-born but 48 percent of foreign-born individuals were currently married (Anderson, 2015). The latter is nearly identical to the overall U.S. average of 50 percent. More fine-grained analyses show only slight differences in rates of marriage among immigrant Blacks from different parts of the world: 52 percent of African immigrants, 45 percent of Caribbean immigrants, and 48 percent of Black immigrants from Latin America were married. These patterns are largely due to the higher levels of education and earnings of immigrant Blacks relative to their U.S.-born counterparts; 26 percent of immigrant Blacks (versus 19 percent of U.S.-born Blacks) have a college degree, and immigrant Blacks reported a median household income of $43,800 in 2013 (versus just $33,500 among U.S.-born Blacks). Thus, any discussion of Black-White differences in family structure needs to consider the distinctive background and socioeconomic resources among the large and heterogeneous population of Blacks in the United States.

**Asian American Families** Asian American families historically have been characterized by interdependence among members of the extended family. In many Asian cultures, family concerns take priority over individual concerns. Family interdependence also helps Asian Americans prosper financially. In fact, family and friend networks often pool money to help their members start a business or buy a house; this help is reciprocated through contributions to the others. The result is a median family income for Asian Americans that is higher than that for non-Hispanic Whites. As each generation of Asian Americans grows increasingly acculturated to life in the United States, however, scholars predict that they will come to resemble White families more and more (Pew Research Center for the People and the Press, 2012). This process may be further hastened by outmarriage. In 2015, 17 percent of all newlywed couples were interracial; however, 29 percent of Asians who married that year wed a person from a different race (Livingston & Brown, 2017).

Although there is less research on the differences among various Asian American subgroups than among Hispanic-origin subgroups, some fertility differences have been established. Chinese American and Japanese American women have much lower fertility rates than any other racial or ethnic group, due partly to their high levels of educational attainment. These differences in educational attainment reflect a range of

economic factors, including the type of jobs their parents held, the conditions under which their families emigrated to the United States, and their language skills. As women remain in school and delay marriage and childbearing, they typically go on to have fewer children. Chinese, Japanese, and Filipino families have lower levels of nonmarital fertility than all other racial or ethnic groups, including non-Hispanic Whites. Low levels of nonmarital fertility combined with low levels of divorce for most Asian American groups demonstrate the emphasis on marriage as the appropriate forum for family formation and maintenance (Pew Research Center, 2013).

**Multiracial Families** Young adults today are more likely than ever to date, cohabit with, and ultimately marry a partner from a different ethnic or racial background. College students may find this increase in intermarriage and interracial dating unsurprising; many of their political leaders and cultural icons like President Barack Obama, American-born British royal Meghan Markle, rapper Drake, and singer Halsey are proudly bi- or multiracial. Yet this change has been dramatic over the past six decades. In 2015, 17 percent of all U.S. newlyweds had a spouse of a different race or ethnicity, a dramatic jump since 1967, when just 3 percent of newlyweds were intermarried. In that pivotal year, the U.S. Supreme Court ruled in *Loving v. Virginia* that marriage across racial lines was legal throughout the country. Until this ruling, interracial marriage was illegal in many states (Livingston & Brown, 2017).

Given how recent these changes have been, the sociological study of multiracial families is still in its nascent forms. Some studies find no differences in the stability of same-race and interracial marriages, whereas others find that intermarriages are more likely to end in divorce (Guzzo & Hayford, 2011; Zhang & Van Hook, 2009). More detailed explorations suggest that interracial marriages vary based on the race and gender of each partner. For instance, recent evidence suggests that marriages between a Black husband and a White wife, and a White husband and a Latinx wife, are slightly more likely than White-White marriages to divorce (Bratter & King, 2008; Fu & Wolfinger, 2011). Studies also yield inconsistent findings regarding childbearing, with some studies showing that intermarried couples have fewer children than same-race White or Black couples (Qian & Lichter, 2017) and others showing no difference (Choi & Goldberg, 2018). Intermarried couples also are similar to same-race couples with respect to unintended pregnancy, with

interracial couples mirroring rates of same-race couples from the husband's racial or ethnic group.

Cultural values are slow to change, and as a result, some studies suggest that spouses in intermarriages (especially women) may be vulnerable to discrimination and microaggressions that undermine their well-being and the well-being of their children. For instance, White-Black couples report negative reactions from strangers as well as less support from family and friends (Childs, 2005). Some White mothers face discrimination if they marry persons of a different ethnicity or race, as they may experience the stigma of being perceived as unqualified to raise and nurture children who are not White (Twine, 1999). Consistent with this finding, Jenifer Bratter and Karl Eschbach (2006) found that White women in intermarriages reported higher rates of distress, relative to their Black female and White male counterparts in intermarriages. However, as multiracial families become more common with each subsequent generation, discriminatory treatment and its consequences may diminish. In 1990, an astonishing 63 percent of White U.S. adults in the General Social Survey said they were "very" or "somewhat" opposed to a close relative marrying a Black person. By 2016, this share plummeted to just 14 percent (Livingston & Brown, 2017). More accepting attitudes may create a more supportive climate for parents and children alike in multiracial families.

## Social Class and U.S. Families

Sociologists studying racial and ethnic differences in U.S. families are always keenly aware of the role that social class plays. As we learned in Chapter 11, Whites, Blacks, Native Americans, Latinos, and Asians differ starkly with respect to their levels of education, the kinds of jobs they hold, their income, their savings, and whether they own homes. Economic and occupational stability is a powerful influence on families, where those with richer resources are more likely to marry and to have children within (rather than outside) marriage. Even studies that focus primarily on race are essentially studies of social class, because race, ethnicity, immigration status, and class have historically been so closely intertwined. Contemporary researchers now largely agree that "the differences between [U.S.-born] Black and White extended family relationships are mainly due to contemporary differences in social and

economic class positions of group members. Cultural differences are less significant" (Sarkisian & Gerstel, 2004).

This finding leads us to a thought-provoking and policy-relevant question: Are racial differences in family formation due primarily to economic or to cultural factors? Consider an example of four individuals, all women, who are the heads of their households: (1) a Black doctor, (2) a White doctor, (3) a Black nurse's aide, and (4) a White nurse's aide. The cultural argument suggests that Blacks and Whites are different, which means that the Black doctor and Black nurse's aide should have family lives that are more similar to each other than they are to the family lives of the White doctor or White nurse's aide. The class argument argues the opposite: that the family lives of the two nurse's aides and the two doctors will be more similar to each other than they will be to the family lives of people of the same race but from a different class position.

Recent studies show that race and class each have distinctive and often complicated influences on family behavior. For instance, while Whites from working-class and poor, often rural, backgrounds—often residing in the southern United States—report very strong ideological support for marriage and bearing children within marriage, their behaviors often depart from these conservative ideals. White young adults of lower- and working-class backgrounds are much more likely than their wealthier peers to get pregnant prior to marriage, marry young, and subsequently divorce (Cahn & Carbone, 2010). Because they often do not attend college, they marry young and bear children young—often before they are financially or emotionally prepared. As a result, they often struggle unsuccessfully with the challenges of marriage and babies, and ultimately divorce. In the past decade, White working-class families have been particularly vulnerable to the opioid crisis, where a young adult's addiction can derail their life chances and destabilize family well-being. For young adult addicts with small children, addiction and death by overdose often means that older adults become custodial grandparents to their orphaned grandchildren (Whalen, 2016).

Middle-class young adults, by contrast, show much more stable family formation patterns. Many cohabit while in school or working in their first jobs, so they marry later and bear children later. Delaying marriage until they are emotionally and financially ready is one of the key reasons college-educated young Whites have lower rates of divorce than their more economically disadvantaged counterparts (Cahn & Carbone, 2010).

Research comparing middle-class Blacks with their less-advantaged counterparts was scarce until the past decade or two, when scholars began to explore middle-class Black families in depth (Lacy, 2007; Landry & Marsh, 2011; Pattillo, 2013). Although middle-class Black families are much more likely than their less economically advantaged peers to live in married-couple households, recent studies detect a new form of middle-class Black family, especially among young adults—the single-person household. Due in part to the shortage of marriageable men and Black men's fairly high rate of intermarrying described earlier, college-educated Black women often live on their own without a romantic partner (Marsh et al., 2007). Studies of intersectionality, or the complex interplay between race and class, provide important insights into the ways both culture and structure shape family lives.

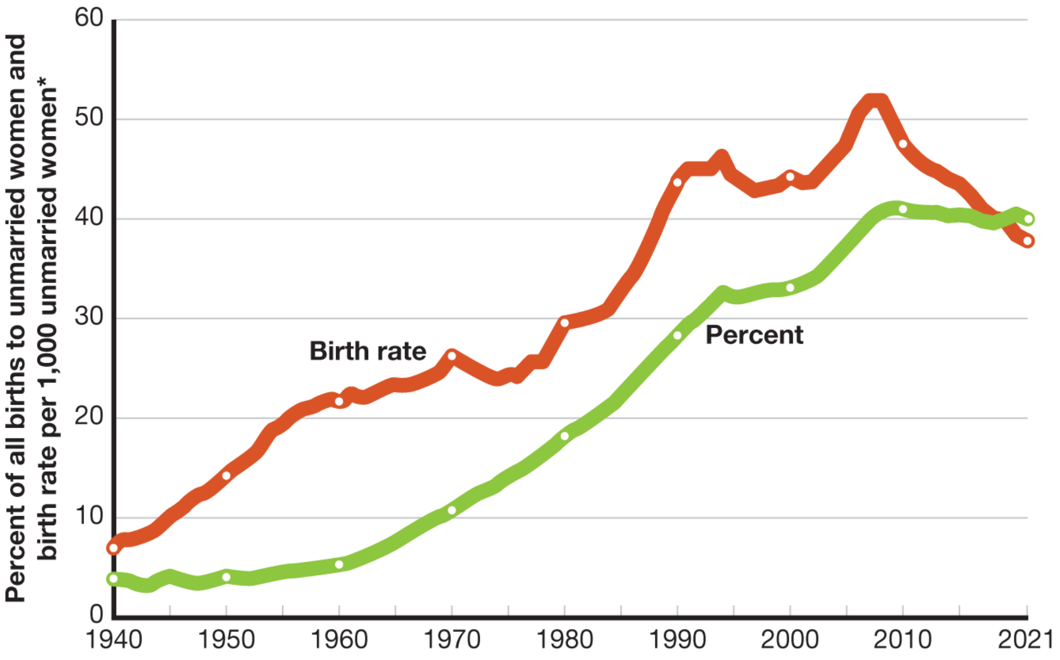
**Nonmarital Childbearing** Nonmarital childbearing continues to be one of the most hotly debated and well-researched areas of family sociology. This intense interest is driven, in part, by the fact that the number of children born outside a marital union today is more than six times higher than it was in the 1950s (see Figure 15.4). Nonmarital childbearing rates peaked in 2008 and have since declined, but they remain high—especially for ethnic minorities. In 2015, 71 percent of all births to Black women, 66 percent of births to American Indian or Alaska Native women, and 53 percent of births to Hispanic women occurred outside marriage, compared with 29 percent for non-Hispanic White women and 16 percent for Asian or Pacific Islander women (Martin et al., 2017). Yet these numbers can be misleading because they suggest that babies are being born to women without male partners, thus denying the children a "father figure." Recent studies show that the majority (63 percent) of all nonmarital births take place in cohabiting unions (Wildsmith et al., 2018), meaning that many of these children are raised by two parents who just happen not to be legally married to each other.

A key question sociologists address is "Why do women have children out of wedlock?" This is an important concern for policy makers because children born to unmarried mothers are more likely to grow up in a single-parent household, experience instability in living arrangements, and live in poverty. As these children reach adolescence, they are more likely to have low educational attainment, engage in sex at younger ages, and have a premarital birth. As young adults, children born outside marriage are more likely to be idle (neither in school nor employed), have

lower occupational status and income, and have more troubled marriages and more divorces than those born to married parents. Studies of children born into unmarried cohabiting unions generally show that they fare better on average than children born to mothers without a coresidential partner, yet they still fare worse on average than those born into marital unions (Manning, 2015).

Figure 15.4

**BIRTHRATE AND PERCENTAGE OF BIRTHS TO UNMARRIED WOMEN, 1940–2021**




*Ages 15 to 44

Source: Osterman et al., 2023.

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Of course, most studies conclude that it is not single or cohabiting mothers who are the problem, but rather the economically disadvantaged conditions that both give rise to and follow from nonmarital childbearing (Wildsmith et al., 2018). For children of cohabiting parents, instability in the parents' relationship statuses—such as breakups and new partnerships—also is a source of children's disadvantage regarding school outcomes and health (Fomby & Cherlin, 2007; Manning, 2015).

Kathryn Edin and Maria Kefalas (2005) ask why low-income women continue to have children out of wedlock when they can hardly afford to do so. Following in the tradition of scholars such as Carol Stack and Elijah Anderson (discussed in Chapter 5), Edin and Kefalas lived with their subjects—among poor Blacks, Whites, and Puerto Ricans in Philadelphia and in Camden, New Jersey. Their interviews with 165 low-income single mothers in Black and White neighborhoods led them to argue that single mothers were not eschewing marriage. To the contrary, women of all ethnicities whom they interviewed highly valued marriage but believed that getting married at that time would make things worse, either committing them to terrible relationships or leading to divorce. As one woman told Edin and Kefalas, "I'd rather say I had a child out of wedlock than that I married this idiot." Or, as others said, a failed marriage would be worse than having children on their own. In an environment in which more men than ever were going to prison or were unemployed, these women needed to be able to fend for themselves.

Two-thirds of the pregnancies in the study were neither planned nor actively avoided. This figure is much higher than the national average, where one-third of all nonmarital pregnancies are considered "unintended" (Curtin et al., 2014). In the poor communities that Edin and Kefalas (2005) studied, women stopped using contraception when the relationship became serious, even if the woman and man had not planned to have children together.

But why do women have children out of wedlock in the first place? First, the researchers find that young people in poor communities feel very confident about their ability to raise children, more so than most middle-class people do. This is because most of the pregnant mothers come from social environments in which young people help raise the other children in a family or in a building.

Second, people living in poverty place a high value on children, perhaps an even higher value than do middle-class families. Part of the reason for this is that they have fewer things to make their lives meaningful; going to college and finding a professional job are rarely options for low-income, inner-city young women. For them, having children brings meaning and order to a life that may be marked by disappointment or chaos (Edin & Kefalas, 2005).

A third reason to "retreat from marriage" has to do with the changing meaning of marriage in low-income communities. Although low-income women do value marriage, what qualifies a man as a potential marital partner has changed over the last 50 years. Edin and Kefalas comment that "in the 1950s all but the most marginally employed men found women who were willing to marry them. Now, however, even men who are stably employed at relatively good jobs at the time of the child's birth . . . aren't automatically deemed marriageable." This view is consistent with the work of sociologist William Julius Wilson (1987), who theorized that a lack of "marriageable" men contributed to low rates of marriage among poor African Americans.

Taken together, this research suggests that women have become more selective. When women who value motherhood highly also set the bar higher for marriage, higher rates of nonmarital fertility follow. Through Edin and Kefalas's (2005) work, we can understand the worldviews of Black, White, and Puerto Rican young people who are having children out of wedlock.

**Class-Based Cultural Practices** Social class shapes more than just whether one marries or cohabits, and whether or when one has children. Many sociological studies have found that child-rearing practices also are powerfully shaped by social class (Sherman & Harris, 2012). In her classic book *Worlds of Pain*, sociologist Lillian Rubin (1977) proposed that children raised in low-income or working-class families were socialized to feel powerless, which would render them vulnerable to anger and limit their capacity to plan for the future in adulthood. Rubin's work set the stage for contemporary scholars like Annette Lareau, whose work reveals how cultural differences in values and beliefs can result in divergent child-rearing, parenting, and disciplinary practices.

Annette Lareau (2011) concluded that middle-class parents engage in "concerted cultivation," working hard to cultivate their children's talents through many nonschool-based activities, as well as continuous linguistic interaction. Working-class and low-income parents, by contrast, focus their child-rearing on the "accomplishment of natural growth": Talk is brief and instrumental, children learn to be more compliant with adult directives, and they participate in few organized activities outside school. They learn to occupy themselves, often playing with neighborhood friends. Lareau drew these conclusions by closely observing 12 families —6 White, 5 Black, and 1 interracial.

According to Annette Lareau, middle-class parents and working-class parents adopt different child-rearing strategies: Middle-class parents engage in “concerted cultivation,” keeping their children busy with nonschool-based activities such as organized sports. Working-class parents undertake the “accomplishment of natural growth.”

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As a result of these child-rearing strategies, Lareau claims, middle-class children develop a sense of entitlement and value an individualized sense of self. They become comfortable questioning authority and making demands on adults and institutions. In contrast, the working-class child-rearing strategy promotes a sense of constraint in children, who become more cautious in dealing with adults, bureaucratic institutions, and authority. Like anthropologist Carol Stack, Lareau also finds that working-class and low-income parents place great importance on close kin ties; thus, these children develop closer relationships with their siblings, cousins, and other relatives. Recognizing the possible dangers of attributing differences to “culture,” Lareau carefully points out that the differences between working-class and middle-class child-rearing practices do not reflect radically different values and priorities but, instead, reflect vastly different levels of income and wealth. Her evidence suggests that if economically disadvantaged parents had more money, their child-rearing strategies would change.

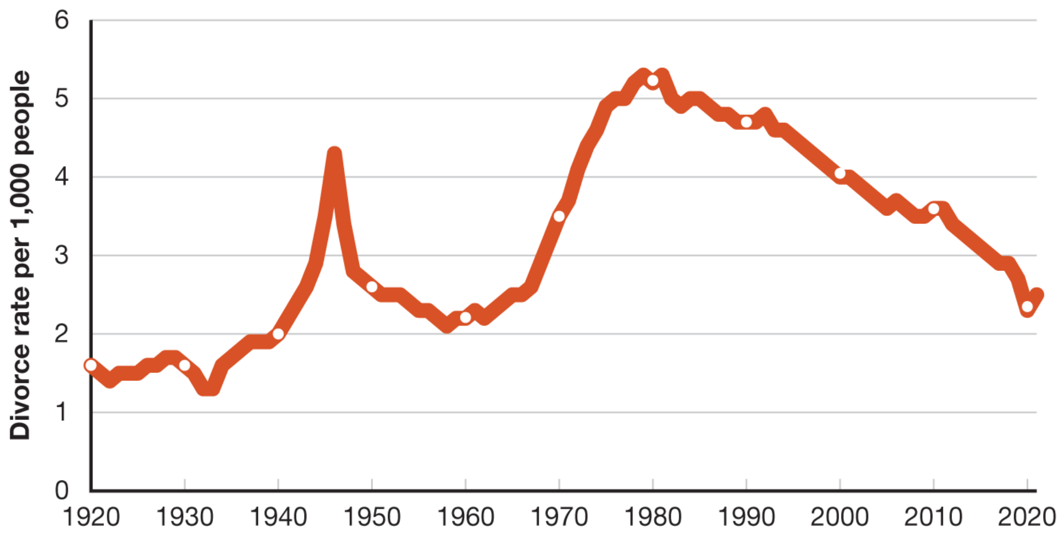
## Divorce and Separation

Divorce rates increased steadily through the latter half of the twentieth century, yet they have leveled off in recent years. Attitudes have changed in tandem, with a stark decline in the proportion of Americans who disapprove of divorce. Whereas for centuries in the West, marriage was regarded as indissoluble, today most countries are making divorce more easily available. Divorce rates (based on the number of divorces per 1,000 married men or women per year) have fluctuated in the United States in different periods (**Figure 15.5**). They rose, for example, after World War II, then dropped off to very low levels in the 1950s before increasing steeply from the 1960s to 1980 (thereafter tapering off and declining somewhat). It used to be common for divorced women to move back to their parents' homes; today, most set up their own households.

Divorce has a substantial impact on children. Since 1970, more than 1 million American children per year have been affected by divorce. In one calculation, about half of children born in 1980 became members of a one-parent family. Since two-thirds of women and three-fourths of men who are divorced eventually remarry, most of these children nonetheless grew up in a family environment, often acquiring new stepsiblings in the process. Remarriage rates are substantially lower for African Americans. Only 32 percent of Black women and 55 percent of Black men who divorce remarry within 10 years. White children are more than twice as likely as Black children (71 percent versus 34 percent) to reside in a home with two married parents (U.S. Bureau of the Census, 2017b).

Figure 15.5

**DIVORCE RATES IN THE UNITED STATES, 1920–2021**




Sources: Centers for Disease Control, 1995, 2015, 2021c; National Center for Health Statistics, 1973.

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Divorce also takes a significant toll on the spouses, although the financial toll is much more severe for women than men. According to one study, the living standards of divorced women and their children fell by 27 percent in the first year following the divorce settlement. The average standard of living of divorced men, by contrast, rose by 10 percent. However, more in-depth investigations find that the economic toll on men varies widely based on the spouses' financial arrangements prior to divorce and custody arrangements following divorce. For instance, one study found that men who were contributing more than 80 percent to family income prior to divorce improved their living standards after divorce by approximately 10 percent at the median, but that for men who contributed a smaller share to family income, divorce resulted in a reduction in living standards (McManus & DiPrete, 2001).

The psychological consequences of divorce, by contrast, are less profound than previously thought. Although divorced women may report heightened symptoms of depression and divorced men may experience increases in depressive symptoms and drinking behavior in the first year or two after divorce, most fare well in the longer term. Remarriage provides significant psychological benefits to men and both psychological and economic benefits to women. However, divorces marked by high levels of acrimony and conflicts regarding child support and child-rearing, for example, often bring psychological strain and

distress to the ex-spouses even several years after their marriages have ended (Carr & Springer, 2010; Carr et al., 2014).

**Reasons for Divorce** Divorce rates are not a direct indicator of marital unhappiness. For example, they do not include separated people who are not legally divorced. Moreover, unhappily married people may stay together because they believe in the sanctity of marriage, worry about the consequences of breaking up, decide to remain together for the sake of the children, or can't afford the costs of divorce proceedings and maintaining two separate residences.

Why did divorce become increasingly common throughout the latter half of the twentieth century? There are several reasons, which involve the wider changes in modern societies and social institutions. First, changes in the law have made divorce easier. Today, individuals may file for a "no-fault" divorce, where one or both parties want the marriage to end and there is no need to present evidence that one spouse is at "fault." Through the first six decades of the twentieth century, by contrast, one party had to prove that the other was at "fault," necessitating compelling evidence of abuse, neglect, infidelity, or other forms of mistreatment that could be difficult to prove from a legal standpoint (Marvell, 1989).

Second, except for a few wealthy people, marriage no longer reflects the desire to perpetuate property and status across generations. As women become more economically independent, it is easier for them to establish a separate household (Lee, 1982). The fact that little stigma is now attached to divorce is partly the result of these developments but also adds momentum to them. Third, there is a growing tendency to evaluate marriage in terms of personal satisfaction. Rising divorce rates do not indicate dissatisfaction with marriage as such, but an increased determination to make it a rewarding and satisfying relationship for the individual spouses, with a reduced desire to stay (unhappily) married "for the sake of the children" (Cherlin, 2009).

**Divorce and Children** The effects of divorce on children are difficult to gauge, and both public sentiment and scholarly research have evolved dramatically over the past four decades. Scholarly interest has shifted as well, with researchers moving away from the very specific question of how divorce affects children, and instead exploring how family instability—including parental divorces and cohabitation breakups, repartnering, and other changes in the household—affects children's emotional,

physical, and cognitive development. As we shall see in the sections below, social selection—or the factors that give rise to parental relationship instability—also may take a toll on child well-being.

Researchers also recognize that not all relationship dissolutions are the same. The conditions under which a parent dissolved their union also bear on child outcomes. For instance, how contentious the relationship is between the parents before separation; the ages of the children; whether there are siblings, grandparents, and other relatives; the children's relationship with their individual parents; and how frequently the children continue to see both parents—all affect the adjustment process.

Early studies of divorce found that children may suffer emotional anxiety right after their parents' separation, yet these effects are relatively short-lived. In a classic study, Judith Wallerstein and Joan Kelly (1980) tracked 131 children of 60 families in Marin County, California, after the separation of their parents. They contacted the children at the time of the divorce, a year and a half after, and five years after. Almost all the children experienced intense emotional disturbance at the time of the divorce. Preschool-age children were confused and frightened, blaming themselves for the separation. Older children better understood their parents' motives for the split but worried about its effects on their future and expressed anger over it. At the end of the five-year period, however, two-thirds were coping reasonably well with their home lives and their outside commitments. One-third remained dissatisfied, and expressed feelings of sadness and loneliness, even when the parent they were living with had remarried.

Wallerstein continued studying 116 of the original 131 subjects at the end of 10-year and 15-year periods (Wallerstein, 2000; Wallerstein & Blakeslee, 1989; Wallerstein & Kelly, 1980). She found that these children brought memories and feelings of their parents' divorce into their own romantic relationships. Almost all felt they had suffered from their parents' mistakes. Most of them shared a hope for something their parents had failed to achieve—a good, committed marriage based on love and faithfulness. Although many of them got married, the legacy of their parents' divorce lived with them. Those who appeared to manage the best had supportive relationships with one or both parents.

Can we reasonably conclude, then, that divorce is bad for children? Despite the many strengths of the Wallerstein study, including an

unusually long follow-up period, it also had many limitations that undermine its generalizability. The parents and children studied all came from an affluent White area and might or might not have been representative of the wider population. Moreover, the families were self-selected: They had approached counselors. Those who actively seek counseling might be less (or more) able to cope with separation than those who do not. In general, studies based on "clinical" or help-seeking samples tend to overstate problems; by definition, the study participants were troubled enough that they had sought professional help.

More recent studies based on population samples found that people with divorced parents had slightly worse mental health, on average, than those whose parents stayed together, but much of the difference had been identified in the children at age seven, before the families experienced divorce (Cherlin et al., 1998). Recent syntheses of decades of research have identified several common consequences of divorce for children (Amato, 2000; Amato & Keith, 1991):

- Almost all children experience an initial period of intense emotional upset after their parents separate.
- Most children resume normal development without serious problems within two years of the separation.
- A minority of children experience some long-term problems as a result of the breakup that may persist into adulthood.

## Repartnering and Stepparenting

Before 1900, almost all marriages in the United States were first marriages. Most remarriages involved at least one widowed person. With the progressive rise in the divorce rate, the level of remarriage also began to climb, and in an increasing proportion of remarriages at least one person was divorced. Today, fully 40 percent of marriages involve at least one previously married person and 20 percent involve two previously married persons (Livingston, 2014). Up to age 35, the majority of remarriages are between divorced people. After that age, the proportion of remarriages with widows or widowers rises (Sweeney, 2010). Over the past two decades, however, some divorced and widowed persons are turning their back on marriage, instead preferring to cohabit or to date steadily without living together, a relationship referred to as living apart together (LAT) (Brown & Wright, 2017).

While repartnering—whether through marriage or cohabitation—has become the norm for formerly married people, men are more likely than women to repartner, and more highly educated, financially secure people are more likely than their less advantaged peers to form new unions (Livingston, 2014). While remarriages provide many of the same benefits as first marriages, including love, companionship, and the economies of scale that come from sharing a household, they also are more likely to result in divorce (Cherlin, 2009). This statistic does not mean that second marriages are doomed to fail. Divorced people may have higher expectations of marriage than those who remain with their first spouses; hence, they may be more ready to dissolve new marriages. The second marriages that endure are usually more satisfying than the first.

The rise in rates of remarriage, and of cohabitation after the dissolution of the first union, has been accompanied by a rising number of stepfamilies. A stepfamily is a family in which at least one of the adults is a stepparent. Many who repartner become stepparents of children who regularly visit rather than live in the same household. By this definition, the number of stepfamilies is much greater than official statistics indicate because the statistics usually refer only to families with whom stepchildren live. Stepfamilies give rise to kin ties resembling those of some traditional societies in non-Western countries. Children may now have four parents involved in their lives: their natural parents and their stepparents. Some stepfamilies regard all the children and close relatives (including grandparents) from previous marriages as part of the family.

Certain difficulties arise in stepfamilies. First, there is usually a biological parent living elsewhere whose influence over the child or children remains powerful. Cooperative relations between ex-partners often become strained when one or both remarry or enter a new cohabiting union. Consider a woman with two children who marries a man with two children, all six living together. If the “outside” parents demand the same times of visitation as previously, the pressures on the newly established family will likely be intense. It may prove impossible to have the new family all together on weekends.

Second, since most stepchildren belong to two households, the possibilities of clashes of habits and outlooks are considerable (Fine et al., 1998). There are few established norms defining the relationship between stepparent and stepchild. Should a child call a new stepparent by name, or is “Dad” or “Mom” more appropriate? Should the stepparent

play the same part in disciplining the children as the natural parent? How should a stepparent treat the new spouse of their previous partner when picking up the children? The difficulties in negotiating these decisions often intensify in later life as aging parents need to turn to their children for caregiving, and stepchildren may not willingly oblige (Sherman et al., 2013).

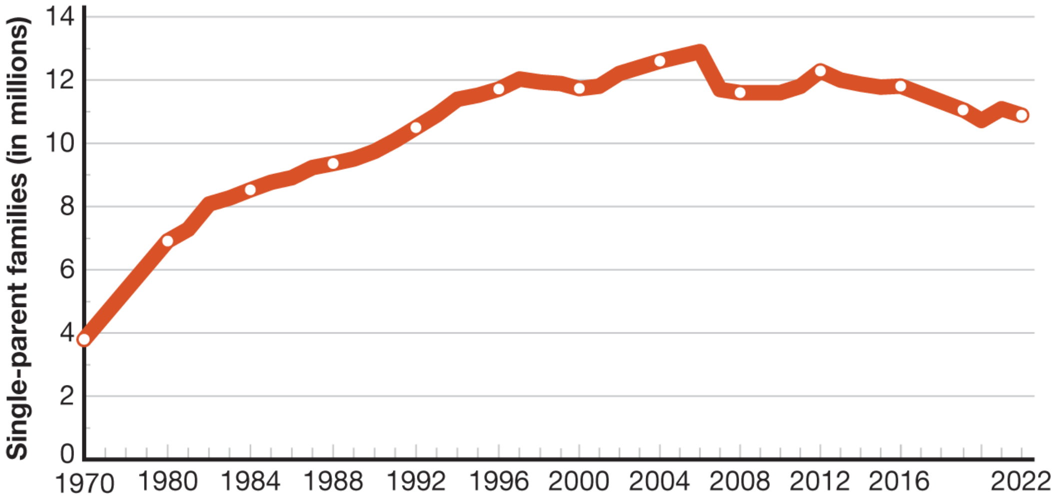
## Single-Parent Households

As a result of increasing divorce rates and births outside marriage, more than half of all children will spend at least some time in a single-parent family. In 2016, 20.2 million children under the age of 18, representing about a quarter of all children, lived with one parent: 17.2 million with their mother and 3 million with their father. More than 80 percent of such families are headed by women because the mother usually obtains custody of the children after a divorce (in some single-parent households, the individual, again almost always a woman, has never been married). There were 10.9 million single-parent households with children under age 18 in the United States in 2022—8.7 million single-mother and 2.2 million single-father families (**Figure 15.6**)—constituting about 30 percent of all families with children under 18 (U.S. Bureau of the Census, 2022b). They are among the poorest groups in contemporary society.

The category of single-parent households is internally diverse. For instance, more than half of widowed mothers are homeowners, but the majority of never-married single mothers live in rented accommodations. Single parenthood tends to be a changing state. For a person who is widowed, the break is clear-cut—although they have been living alone for some while if the partner was hospitalized before death. About 60 percent of single-parent households today, however, are the result of separation or divorce. In such cases, individuals may live together sporadically over a lengthy period.

Figure 15.6

**RISE OF SINGLE-PARENT FAMILIES, 1970–2022**




Source: U.S. Bureau of the Census, 2022b.

Most people do not wish to be single parents, but a growing minority choose to have a child or children without the support of a spouse or partner. “Single mothers by choice” aptly describes some parents who possess sufficient resources to manage as a single-parent household. According to the National Center for Health Statistics, the most rapidly increasing rates of nonmarital births between the years 2007 and 2012 were to unmarried women ages 35 and older. During the same period, rates of nonmarital births among younger women either declined or stayed stable. Women in their late thirties and forties today recognize that they can have a child on their own without facing the stigma that plagued single mothers in earlier generations. Many also have the financial means to support a child on their own (Curtin et al., 2014).

The vast majority of the more than 20 million children living with one parent live with their mother.

For the majority of unmarried or never-married mothers, however, the reality is different: There is a high correlation between the rate of births outside marriage and indicators of poverty and social deprivation. These are key influences underlying the high proportion of single-parent households among families of African American background in the United States.

Sociologists debate the effect on children of growing up with a single parent. A highly influential study by Sara McLanahan and Gary Sandefur (1994) rejects the claim that children raised by only one parent do just as well as children raised by both parents. A large part of the reason is economic: the sudden drop in income associated with divorce. Other reasons include inadequate parental attention and lack of social ties. Separation or divorce weakens the connection between child and father, and the link between the child and the father’s network of friends and acquaintances. The authors conclude it is a myth that strong support networks or extended family ties are usually available to single mothers. Others have also pointed out that although most children growing up in single-parent homes are disadvantaged, it is better for children’s mental health if parents in extremely high-conflict marriages divorce rather than

stay together (Amato et al., 1995). Divorce may benefit children growing up in high-conflict households while harming children whose parents have relatively low levels of marital conflict before divorcing.

## Being Child-Free

The number of Americans who do not have children increased steadily throughout the 1980s and 1990s, yet has recently dipped (Livingston, 2015). Calculating precisely who is child-free is difficult; researchers historically have classified a woman as having no children if she has had zero children by age 44. Using this metric, the proportion of women ages 40 to 44 with no children—regardless of marital status—climbed from 10 percent in 1986 to 15 percent in 1986 to 20 percent in 2006; the share had dropped to 14 percent by 2016.

White women between the ages of 15 and 50, both married and unmarried, are considerably more likely than Black or Hispanic women to be child-free (44.4 percent versus 40.8 percent and 44.2 percent, respectively), although Asian women (at 45.5 percent) are more likely than any other race to be childless (U.S. Bureau of the Census, 2018). Women with a college degree or higher are more likely than high school graduates or dropouts to have no children. Most studies find that a relatively small fraction of these women are involuntarily childless; with advances in health and technology, the proportion who cannot physically bear children is modest. Rather, the reasons are often social and psychological, including not having a partner with whom one would want to have a child, a preference for a child-free lifestyle, concerns about the environment and bringing a child into an unsafe world, and concerns about whether one has the financial and emotional wherewithal to have a child (Connidis & McMullin, 1996; Jacobson & Heaton, 1991).

Childlessness was historically viewed as a stigmatized identity, a mark of a "barren" woman or a woman who was "selfish" and prioritized her own career pursuits over motherhood (May, 1997). However, in recent decades, being child-free has been increasingly recognized as a status that is desirable and even preferable for many women and men. Those who do not have children have myriad opportunities to "give back" to the next generation by volunteering or caring for nieces or nephews, should they choose to do so (Sandler, 2013).

## Same-Sex Couples

Many lesbian, gay, bisexual, transgender and queer (LGBTQ+)-identified persons live in stable relationships as couples today. According to recently released Census Bureau data, there are over 1.2 million same-sex married-couple households and roughly 500,000 same-sex unmarried-partner households in the United States (Scherer, 2022). By 2016, same-sex couples accounted for roughly 1 percent of households in the United States (Goldberg & Conron, 2018).

In June 2015, the U.S. Supreme Court legalized same-sex marriage, guaranteeing all same-sex married couples the same benefits as opposite-sex married couples at both the state and federal level.

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The number of same-sex partners who are legally married is expected to skyrocket in the next decade. One of the most profound and rapid social changes of the twenty-first century has been the legalization of gay marriage. One important turning point occurred in June 2013, when the U.S. Supreme Court declared the Defense of Marriage Act (DOMA) to be unconstitutional in the landmark case *United States v. Windsor*. DOMA, passed by Congress and signed by President Bill Clinton in 1996, had defined marriage as “a legal union between one man and one

woman." Yet an even more important and pathbreaking Supreme Court decision was handed down on June 26, 2015, when the court ruled by a 5–4 vote that the U.S. Constitution guarantees individuals the right to same-sex marriage. Technically, the ruling says that states cannot prohibit the issuing of marriage licenses to same-sex couples or deny recognition of lawfully performed out-of-state marriages for same-sex couples. This ruling invalidated same-sex marriage bans and effectively made same-sex marriage legal in every state in the nation (Liptak, 2015).

The United States is not alone in its rapidly growing acceptance of same-sex unions. A growing number of countries have legalized same-sex marriage, including Argentina, Canada, Ireland, Norway, Spain, Denmark, Uruguay, New Zealand, South Africa, Germany, and France, and, most recently, Northern Ireland, Ecuador, and Austria. Other parts of the world are slower to adapt; South Africa is the only nation in Africa where same-sex marriage is legally recognized (Human Rights Campaign, 2017). Similarly, Taiwan became the first country in Asia to legalize same-sex marriage nationwide in May 2019, and in 2020 Costa Rica became the first nation in Central America to legalize gay marriage.

# The Bleak Side of Families

Family life encompasses the whole range of emotional experience. Family relationships—between spouses or cohabiting romantic partners, parents and children, brothers and sisters, or more distant relatives—can be warm and fulfilling. But they can equally be extremely tense, driving people to despair or imbuing them with anxiety and guilt. The dark side of family life belies the rosy images of family harmony frequently depicted in TV shows and commercials. It can take many forms. Among the most devastating are the incestuous abuse of children and domestic violence.

## Family Violence

Violence within families is perpetuated primarily by men. The two broad categories of family violence are child abuse and intimate partner violence (IPV). Because of the sensitive and private nature of violence within families, it is difficult to obtain national data on levels of domestic violence. Data on child abuse are particularly sparse because of the

cognitive development and ethical issues involved in studying child subjects. While family violence has been a concern throughout history, it was particularly acute during the Covid-19 pandemic, when stay-at-home orders meant that victims were essentially trapped at home with their abuser (Humphreys et al., 2020).

**Child Abuse** The most common definition of child abuse is serious physical harm (trauma, sexual abuse with injury, or willful malnutrition) with intent to injure. One national study of married or cohabiting adults indicated that about 3 percent of respondents abused their children, though cohabiting adults were no more or less likely to abuse their children than married couples (Brown, 2004; Sedlak & Broadhurst, 1996).

More recent statistics are based on national surveys of child-welfare professionals. However, these surveys miss children who are not seen by professionals or who are not reported to state agencies. Researchers estimate that as many as 50 to 60 percent of child deaths from abuse or neglect are not recorded (U.S. Department of Health and Human Services, 2008). Statistics based on the National Child Abuse and Neglect Data System indicate that in 2021 an estimated 600,000 children were victims of abuse or neglect. Of these, 76 percent suffered neglect, 16 percent suffered physical abuse, and 10 percent were sexually abused; 90.6 percent of victims were maltreated by their parents. American Indian or Alaska Native children suffered the highest rate of abuse at 15.1 per 1,000 children in the population of the same race or ethnicity. Black children experienced the second-highest rate at 13.0 per 1,000 children of the same race or ethnicity (Children's Bureau, 2023).

The effects of child abuse can linger for years, if not decades, after the child escapes the abusive situation. Recent studies show that adult men and women who suffered physical or sexual abuse in childhood are at elevated risk of multiple health conditions in midlife, including depression, chronic pain (Goldberg, 1994), sleep problems (Greenfield et al., 2011), and metabolic syndrome (Lee et al., 2014). Some evidence also suggests that victims of child abuse are more likely to commit abuse against partners and their own children, thus amplifying and perpetuating the cycle of abuse for future generations (Widom et al., 2015).

**Intimate Partner Violence** Abuse of one's spouse or romantic partner is widespread in the United States. A 1986 study by Murray Straus and

Richard Gelles found that IPV had occurred at least once in the past year in 16 percent of all marriages and at some point in the marriage in 28 percent of all marriages. This study does not, however, distinguish between severe acts, such as beating up and threatening with or using a gun or knife, and less severe acts, such as slapping, pushing, grabbing, or shoving. When the authors disaggregated this number, they found that approximately 3 percent of all husbands admitted perpetrating at least one act of severe violence on their spouse in the previous year; this figure is likely an underestimate.

More recent data, based on the National Intimate Partner and Sexual Violence Survey (NISVS), indicate even higher rates of severe violence, although these data refer to abuse among both married and nonmarried romantic partners. For instance, these data from 2017 show that 19 percent of women and 7.6 percent of men had experienced sexual violence by an intimate partner during their lifetimes. Severe physical violence by an intimate partner (including acts such as being hit with something hard, being kicked or beaten, or being burned on purpose) was reported by 47 percent of women and 44 percent of men during their lifetimes (Benner, 2022).

Trend data can tell us about the prevalence of IPV, but not the nature of abuse or the context giving rise to it. Michael Johnson (1995) has identified two broad types of IPV: “patriarchal terrorism,” which is perpetuated by feelings of power and control, versus “common couple violence,” which generally relates to a specific incident and is not rooted in power or control. Sociological studies show that IPV is closely related to structural factors, including low levels of power among women, and cultural factors, including widespread acceptance of violence and beliefs that male power is equated with violence (Jewkes, 2002). Violence is particularly likely to occur among couples whose relationships are marked by conflict, especially conflicts about finances, jealousy, substance use, and the husband’s belief that his wife is violating traditional gender roles. Women who are more empowered educationally, economically, and socially are most protected from IPV (Jewkes, 2002).

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## CONCEPT CHECKS

1. **What are four conditions that have contributed to changing family forms throughout the world?**

2. **Briefly describe changes in family structure in the United States since 1960.**
3. **Name two ways that Black and White families differ from each other.**
4. **What are the main reasons divorce rates increased sharply during the latter half of the twentieth century?**

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# Glossary

stepfamily
: A family in which at least one partner has children from a previous marriage, living either in the home or nearby.

# 4 UNANSWERED QUESTIONS

**Understand the ways that cohabitation differs from marriage, how parents' sexual orientation affects their children, and the linkage between marital status and happiness.**

As you have learned so far, family is an ever-evolving institution. As families change and new questions arise about these new forms, sociologists face the challenge of developing rigorous research to address these questions. Some of the most pressing questions facing family sociologists today focus on family forms that were once considered "nontraditional" or even "deviant," such as cohabiting families, same-sex couples with children, and persons who choose to forgo marriage and live life on their own. Each of these fascinating groups has grown rapidly in number over the past half decade, prompting sociologists to explore new and evolving questions.

## Is Cohabitation a Substitute for Marriage?

If current statistics are any indicator, roughly half of all students reading this textbook will live with their romantic partner before marrying. Cohabitation—in which a couple lives together in a sexual relationship without being married—has become increasingly widespread in most Western societies. Until a few decades ago, cohabitation was regarded as somewhat scandalous, but during the 1980s the number of unmarried men and women sharing a household went up sharply. The proportion of young couples who cohabit rose from 11 percent in the early 1970s to 44 percent in the early 1980s and to slightly below 50 percent by 2013 (Copen et al., 2013). Cohabitation has become widespread among college and university students, although they did not initiate this trend. Larry Bumpass and his coworkers (1991) found that the cohabitation phenomenon started with lower-educated groups in the 1950s—probably as a substitute for marriage, which may involve economic constraints.

While, for some, cohabitation today may be a substitute for marriage, for many, it is a stage in the process of relationship building that precedes marriage. Young people usually come to live together by drifting into it, rather than through calculated planning. A couple having a sexual relationship spend increasing time together, eventually giving up one of their individual homes. While in the 1980s and 1990s, cohabiting couples said their main reason for cohabiting was to “be sure they are compatible before marriage” (Bumpass et al., 1991), very different reasons are given by cohabiters in the early twenty-first century. One study of cohabiters found that the main reasons a couple moved in together were because the partners “loved spending time together” and wanted to share love, intimacy, and space (see Table 15.2) (Rhoades et al., 2009).

Gender differences have been found when it comes to the reasons cited for cohabiting. One recent study conducted focus group interviews with cohabiting men and women and found that both genders said their primary motives for cohabiting included spending time together and evaluating compatibility. Men, however, were concerned about the loss of freedom that would come with marriage whereas women worried that cohabitation would further delay marriage. One of the most important factors for lower-income young adults is money; sharing an apartment helps save money, and cohabiting pushes off the expenses of a wedding (Huang et al., 2011; Sassler & Miller, 2017).

**Table 15.2REASONS FOR COHABITING**

| |
|---|
| Researchers interviewed 123 heterosexual cohabiting couples and asked them how strongly they agreed or disagreed with each of 29 reasons for cohabiting with their partners. A score of 1 meant “strongly disagree,” and a score of 7 meant “strongly agree.” Here are the top five and bottom five reasons listed. |
| **TOP FIVE REASONS** |
| Because I love spending time with him/her. |
| |

| |
|---|
| Because I wanted to spend more time with him/her. |
| So that we could have more daily intimacy and sharing. |
| Because I want us to have a future together. |
| Because we were spending most nights together anyway. |
| **BOTTOM FIVE REASONS** |
| Because I had doubts about how well I could handle being in a serious relationship. |
| Because I was concerned that he/she might not make a good husband/wife and thought living together would be a good way to find out. |
| Because it was inconvenient to have some of my stuff at my place and some at my partner’s. |
| Because I wanted to find out how much work he/she would do around the house before deciding about marriage. |
| Because I was concerned about how my partner handles money and wanted time to test out my concerns before marriage.<br><br>Source: Rhoades et al., 2009. |

For most couples, cohabitation is a temporary state—leading either to marriage or a breakup. The likelihood that cohabitation leads to marriage has diminished for recent cohorts, while the chance that a cohabiting union breaks up has increased. Sara Mernitz (2018) studied two cohorts of cohabiters, one born in the early 1980s and the other born in the late 1950s through early 1960s. Only one-third of the younger cohort of cohabiters married within five years of entering their union, compared to 41 percent among the older cohort. Similarly, younger cohorts are more likely to see their cohabiting union break up (Guzzo, 2014; Kuo & Raley, 2016).

Cohabitation has grown in popularity in the United States and other Western countries. For most couples, cohabitation is a temporary state.

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The chances of a cohabiting union transitioning to a first marriage are related to several socioeconomic factors. For instance, White cohabiting couples are more likely than their Black or Latinx counterparts to marry within three years. The likelihood of a first marriage resulting from cohabitation is positively associated with higher education, the absence of children during cohabitation, and higher family income. It is also more likely in communities with low male unemployment rates (Bramlett & Mosher, 2002; Copen et al., 2013). These data are consistent with the

claim that marriage after cohabitation has become an institution of economic and racial privilege (Cherlin, 2009; Sassler & Miller, 2017).

Increasingly, evidence shows that rather than being a “stage in the process” between dating and marriage, cohabitation may be an end in itself. For a very small subset, cohabitation is preferable to marriage. Longtime cohabiters with no plans to marry say that they prefer cohabitation due to their unease about the meanings associated with marriage and concerns about what marriage does to a relationship (Hatch, 2015).

For a rapidly growing number of couples, cohabitation is “marriage-like” in that it is a context for bearing and rearing children. In the early 1980s, 29 percent of all nonmarital births were to those in cohabiting unions. Recent estimates suggest that 62 percent of births to never-married women are to women in a cohabiting union (Lamidi & Manning, 2016). However, White and Latinx women are much more likely than Black women to have a birth in the context of a cohabiting relationship (Payne et al., 2012). Part of the reason more babies are born into cohabiting unions is that pregnant women today don’t feel the same social pressure to marry their partner as they would have in past years. In the past, couples who got pregnant before they were married might have had a “shotgun” wedding before the birth of the baby. Currently, however, only 11 percent of single women who have a pregnancy that results in a live birth are married by the time the child is born. Fewer unmarried couples—whether cohabiting or not—are marrying before the birth of their child. There has, however, been an increase in the rate at which unmarried women begin cohabiting with their partner once they find out they are pregnant: Currently, 11 percent of single women who have a pregnancy that results in a live birth begin cohabiting by the time the baby is born—the same number as marry to “legitimate” a pregnancy.

Although cohabitation is increasingly like marriage in that couples enter into it for love, companionship, support, and child-rearing, it does differ from marriage in one important way: Cohabitation is less stable than marriage. Whereas the likelihood of a first marriage ending in separation or divorce within 5 years is 20 percent, there is a 49 percent chance that a premarital cohabitation will break up within 5 years. Similarly, after 10 years, the probability of a first marriage ending is 33 percent, compared with 62 percent for cohabitations (Bramlett & Mosher, 2002). Because cohabiting unions tend to be less stable than marriage, children born to

cohabiting parents experience family instability that can undermine their emotional and cognitive well-being (Manning, 2015). Part of this association is due to social selection; as we noted earlier, cohabiting families are more likely than married families to be poor, and poverty harms children in many ways. Cohabiting parents also tend to have less formal education—a key indicator of both economic and social resources—than married parents do. And cohabiting parent families don't have the same legal protections that married parent families have. However, more detailed analyses show that stable cohabiting families with two biological parents offer many of the same health, cognitive, and behavioral benefits that stable married biological parent families provide. Overall, scholars tend to believe that cohabitation is a highly varied experience, with some couples enjoying long-term satisfying unions that are "marriage-like" and provide a stable environment for their children, and other couples living together as a trial, treating cohabitation as a more serious form of "dating."

# Do Children Raised by Same-Sex Parents Fare Differently Than Children Raised by Opposite-Sex Parents?

Alongside the increase in same-sex marriage, same-sex couples are forming families with children in unprecedented numbers. Sixteen percent of same-sex-couple households include children; 8.1 percent of same-sex male couples and over 24 percent of same-sex female couples raised children between 2014 and 2016 (Goldberg & Conron, 2018). According to the Williams Institute, an estimated 37 percent of LGBTQ+-identified persons have been a parent, and an estimated 6 million children in the United States have lived with a gay parent at some point in their lives (Gates, 2013).

The legal, cultural, and technological landscapes facing gay parents and their children have changed dramatically in recent years. Increasingly tolerant attitudes toward LGBTQ+ persons have been accompanied by a growing tendency for courts to allocate custody of children to mothers living in lesbian relationships. All 50 states now allow LGBTQ+ individuals to adopt a child, although states vary in their policies regarding second-parent adoption (where one partner adopts a child and

the partner applies to be a second or co-parent) and joint adoption (where the partners adopt a child together) (Family Equality Council, 2023). Although lesbian couples may have a child by donor insemination and gay men may rely on a surrogate to carry a biological child, same-sex couples are four times as likely as different-sex married or cohabiting couples to have an adopted child or stepchild (22 percent versus 5 percent). Just 73 percent of same-sex couples have biological children only (compared to roughly 90 percent of different-sex married or cohabiting couples). Roughly similar shares of same-sex and different-sex couples have both biological children and adopted children or stepchildren (4 to 6 percent) (Gates, 2013).

Most sociological research finds that children raised by same-sex parents fare no better or worse than children raised by different-sex parents.

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Popular media images in recent years, such as the film *The Kids Are All Right* and the TV show *Modern Family*, depict same-sex parents as providing the same love and guidance as heterosexual parents. But what do sociological studies show? Does parental sexual orientation shape how children turn out? This question continues to generate heated political debates today, although a strong consensus has emerged among scholars that the ability to parent effectively is not related to sexual orientation. Although one controversial study argued that children of parents who had

ever had a same-sex relationship would go on to face greater adversity, this study has since been discredited for its serious methodological limitations (Regnerus, 2012).

The most persuasive and comprehensive studies to date, including the American Psychological Association's (2005) review of 60 studies and the American Academy of Pediatrics' seminal report (Perrin et al., 2013), have concluded that "not a single study has found children of lesbian or gay parents to be disadvantaged in any significant respect relative to children of heterosexual parents." The 60 studies considered a range of outcomes, including school performance, social adjustment, and emotional well-being, concluding that children's well-being is much more closely tied to their parents' "sense of competence and security"—and the "social and economic support" parents provided their children—than to their parents' sexual orientation.

For example, Michael Rosenfeld (2010) finds that the children of gay parents are just as likely as the children of straight parents to progress successfully throughout their school grades without being left back. Part of the reason children fare equally well regardless of parental sexual orientation is that sexual orientation has no bearing on one's capacity to be a loving parent. Moreover, children of same-sex couples usually share a common peer and school environment with children of heterosexual couples. As such, their experiences at school and with peers are very similar regardless of their parents' romantic preferences (Rosenfeld, 2010). Most studies also show no differences in the psychological adjustment of children raised by same-sex or opposite-sex parents; for example, several studies of teenagers show no differences in their depressive symptoms, anxiety, self-esteem, or risk of ADHD (attention deficit hyperactivity disorder) (Adams & Light, 2015; Baiocco et al., 2018; Gartrell & Bos, 2010; Lamb, 2012).

Although children of either gay or straight parents are not significantly advantaged or disadvantaged, some studies point out a small number of differences. For example, sociologists Judith Stacey and Timothy Biblarz (2001) reviewed 21 studies dating back to the 1980s and found that children in gay households are more likely to buck stereotypical male-female behavior. For example, boys raised by lesbians appear to be less aggressive and more nurturing than boys raised in heterosexual families. Daughters of lesbians are more likely to aspire to become doctors, lawyers, engineers, and astronauts. The balance of evidence shows that

children of gay parents are just as happy, healthy, and academically successful as their peers raised by heterosexual parents, and they may have more flexible views of gender and gender-typed behaviors.

# Are Single People Less Happy Than Married People?

The broad category of “single” encompasses both people who have never married and those who have married but are now single due to divorce, separation, or widowhood. The number of people living alone in U.S. society has increased dramatically in recent decades. Several factors have combined to create this trend. First, people are marrying later than ever. That means that more people in their twenties, thirties, and even forties are living alone, waiting for the “right one” to come along. Second, the rise and stabilization of divorce rates over the past half century mean that many more people are living on their own when their marriage ends. Third, the “graying” of the U.S. population (see Chapter 12) is accompanied by growing numbers of older adults whose partners have died and who now live alone as widows and widowers, as well as rising numbers of persons who divorce in later life and prefer not to repartner. Fourth, the “stigma” of being single has diminished, due in part to television shows such as *Sex and the City*, which glamorized the lifestyles of “single and fabulous” women. As such, many more Americans are happily choosing to live their lives on their own (Byrne & Carr, 2005; Klinenberg, 2012a).

Yet are people really happy on their own, or are they better off being married? A large body of literature dating back to Émile Durkheim’s classic *Suicide* (1897/1966) argues that social ties, especially marriage and parenthood, are essential to one’s physical, social, and emotional well-being. Recent contemporary studies also show that divorced and widowed people report more sickness, depression, and anxiety compared with their married counterparts, although much of this disadvantage reflects the strains that precede a marital transition (such as a spouse’s illness or marital strife), as well as the strains that follow from the dissolution, such as financial worries or legal battles (Carr & Springer, 2010).

But what about people who are long-term singles or who choose to live alone without a spouse or partner? To date, these individuals are relatively rare; more than 90 percent of American adults do ultimately marry. However, researchers have projected that as many as one in five millennials will never marry. Many reasons are given, including the four reasons cited in this section's opening paragraph. Millennials (those born 1981–1996) are particularly likely to face financial obstacles to marry, given their high levels of unemployment, school debt, and tendency to live with their parents rather than on their own when in their twenties (Wang & Parker, 2014).

Yet is lifelong singlehood a bad thing? Are singles' lives marked by loneliness and desolate evenings at home eating frozen dinners alone? Research by sociologist Eric Klinenberg (2012a) and others finds that living alone can "promote freedom, personal control, and self-realization —all prized aspects of contemporary life" (Klinenberg, 2012b). After interviewing more than 300 people who live alone, he found that they had more rather than less social interaction than their married counterparts, and many of their social interactions were those they sought out by choice: encounters with friends, volunteering, arts events, classes, and other meetings that rounded out their lives. These patterns hold among older adults and younger adults alike. As Klinenberg observed, for many people, living alone and being able to choose how and with whom they spend their time is a sought-after luxury.

Taken together, research showing that people who live alone (by choice) are no better or worse off than their partnered peers underscores one of the core themes of the sociology of families: There is no one "best" or "typical" way in which Americans arrange their social lives. Rather, the freedom to choose one's relationships is essential to one's happiness.

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## CONCEPT CHECKS

1. **What differences have researchers detected when comparing the children of gay and straight parents?**
2. **Contrast the social lives and well-being of persons who live alone with those of persons who live with a spouse or partner.**

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# Glossary

cohabitation
: Two people living together in a sexual relationship of some permanence without being married to each other.

# THE BIG PICTURE

# Chapter 15

## Families and Intimate Relationships

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**Exercises:** Thinking Sociologically

1. Compare the structures and lifestyles among contemporary White non-Hispanic, Asian American, Hispanic, and African American families using the text's presentation.
2. Increases in cohabitation and single-parent households suggest that marriage may be losing ground in contemporary society. However, this chapter claims that marriage and the family remain firmly established social institutions. Explain the rising patterns of cohabitation and single-parent households, and show how these seemingly paradoxical trends can be reconciled with the claims offered by this textbook.

# BASIC CONCEPTS p. 587

## Learning Objectives

Learn how sociologists define and describe families.

## Terms to Know

family • kinship • marriage • nuclear family • extended family • families of orientation • families of procreation • matrilocal • patrilocal • monogamy • polygamy • polygyny • polyandry

## Concept Checks

1. Contrast a family of orientation and a family of procreation.
2. Provide an example of a nuclear family and an extended family.
3. What are several alternatives to monogamy?
4. Why have rates of polygamy declined in contemporary society?

# THEORETICAL AND HISTORICAL PERSPECTIVES ON FAMILIES p. 589

## Learning Objectives

Review the development of sociological thinking about families. Learn how families have changed over the last 500 years, and the social and economic factors underlying these changes.

## Terms to Know

primary socialization • personality stabilization • affective individualism

## Concept Checks

1. According to the functionalist perspective, what are the two main functions of the family?
2. How do symbolic interactionist approaches to studying family differ from functionalist approaches? What are two critiques of the symbolic interactionist perspective?
3. According to feminist perspectives, what three aspects of family life are sources of concern? Why are these three aspects troubling to feminists?

4. What characteristics distinguished the three historical stages of family development, as articulated by historical sociologist Lawrence Stone?

# RESEARCH ON FAMILIES TODAY p. 598

## Learning Objectives

Learn about patterns of dating, cohabitation, marriage, same-sex unions, childbearing, divorce, remarriage, and child-free families. Analyze how these patterns today differ from those of other periods. Understand race, ethnic, and social-class differences in contemporary families.

## Terms to Know

stepfamily

## Concept Checks

1. What are four conditions that have contributed to changing family forms throughout the world?
2. Briefly describe changes in family structure in the United States since 1960.
3. Name two ways that Black and White families differ from each other.
4. What are the main reasons divorce rates increased sharply during the latter half of the twentieth century?

# UNANSWERED QUESTIONS p. 626

## Learning Objectives

Understand the ways that cohabitation differs from marriage, how parents' sexual orientation affects their children, and the linkage between

marital status and happiness.

### Terms to Know

cohabitation

### Concept Checks

1. What differences have researchers detected when comparing the children of gay and straight parents?
2. Contrast the social lives and well-being of persons who live alone with those of persons who live with a spouse or partner.

# Glossary

family
: A group of individuals related to one another by blood ties, marriage, or adoption, who form an economic unit, the adult members of which are responsible for the upbringing of children. All known societies involve some form of family system, although the nature of family relationships varies widely. While the main family form in modern societies is the nuclear family, extended family relationships are also found.

kinship
: A relation that links individuals through blood ties, marriage, or adoption. Kinship relations are by definition part of marriage and family, but they extend much more broadly. While in most modern societies few social obligations are involved in kinship relations extending beyond the immediate family, in other cultures kinship is of vital importance to social life.

marriage
: A socially approved sexual relationship between two individuals. Marriage historically has involved two persons of opposite sexes, but in the past decade, marriage between same-sex partners has been legalized in a growing number of states and nations throughout the world. Marriage normally forms the basis of a family of procreation—that is, it is expected that the married couple will produce and bring up children.

nuclear family

A family group consisting of two adults and dependent children.

extended family

A family group consisting of more than two generations of relatives living either within the same household or very close to one another.

families of orientation

The families into which individuals are born. Also known as *families of origin*.

families of procreation

The families individuals initiate through marriage, cohabitation, or by having children.

matrilocal

Describes a family system in which the husband is expected to live near the wife's parents.

patrilocal

Describes a family system in which the wife is expected to live near the husband's parents.

monogamy

A form of marriage in which each married partner is allowed only one spouse at any given time.

polygamy

A form of marriage in which a person may have two or more spouses simultaneously.

polygyny

A form of marriage in which a man may simultaneously have two or more wives.

polyandry

A form of marriage in which a woman may simultaneously have two or more husbands.

primary socialization

The process by which children learn the cultural norms and expectations for behavior of the society into which they are born. Primary socialization occurs largely in the family.

personality stabilization

According to the theory of functionalism, the family plays a crucial role in assisting its adult members emotionally. Marriage is the arrangement through which personalities are supported and kept healthy.

affective individualism

The belief in romantic attachment as a basis for contracting marriage ties.

stepfamily

A family in which at least one partner has children from a previous marriage, living either in the home or nearby.

cohabitation

Two people living together in a sexual relationship of some permanence without being married to each other.

# 16 Education

The admissions process at major American universities has

1. **always favored prettier or more handsome people.**
2. **always favored minorities.**
3. **always favored athletes.**
4. **undergone serious revision over time.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

## LEARNING OBJECTIVES

1. **Basic Concepts** Learn sociologists' explanations for achievement gaps among different groups of students.
2. **Sociological Theories of Education** Understand the social functions of schooling. Learn three major sociological perspectives on the role of schooling in society.
3. **Research on Education Today** Become familiar with the most important research on whether education reduces or perpetuates inequality. Learn the social and cultural influences on educational achievement.
4. **Unanswered Questions** Learn about some of the current educational issues that concern sociologists, including the debate over the sources of IQ, the merits of homeschooling, and the benefits of international education.

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The correct answer is *d*, because the criteria for admission to universities have changed over time. In the early twentieth century, college admissions began to undergo a series of major transformations, for reasons that were kept discreetly out of the public eye (Gladwell, 2005; Karabel, 2005). In 1905 the SAT was instituted, and for the first time people started getting into college on the basis of standardized tests. Within a few years, the Harvard class had become 15 percent Jewish, as Jews (not unlike Asians today) excelled at the standardized test in disproportionate numbers. Sociologists to this day disagree about whether this success can be explained by cultural characteristics or economic advantages that even some relatively poor ethnic and religious minorities experience in comparison with many other minority groups that don't do as well.

Nevertheless, reflecting the wider anti-Semitism of the era, the people who were running Harvard looked at this outcome as a very undesirable turn of events. The administrators drew an analogy between the university and hotels in upstate New York—first the Jews would arrive, then the Gentiles would leave, and then the Jews would leave and nobody would be left or want to attend the school anymore (Zimmerman, 2010). So Harvard determined that it needed to find another way of conducting admissions. Rather than putting quotas on Jews, they decided to change to a system of admissions very much like the one we know today. They

would start to look at "the whole person," rather than give advantages to people simply because they'd done well on a standardized test. In recent years, these institutions have generally transitioned to looking for "best graduates" rather than "best students": that is, not students who will excel academically in college, but instead those who will become successful after college (Gladwell, 2005). Excellent high school students compete for a limited number of spots at elite American colleges, with many able candidates being rejected in favor of athletes or student leaders in lower academic standing.

Today, it seems natural that a college would want to get to know a student as a whole person. In your college application, you had to write an essay that helped define you as a total human being. You may have tried to show what an interesting person you are by discussing the clubs you were a part of and the sports you participated in. While answer *c* is not entirely correct, athletes may experience an advantage in admissions over their peers, even when their GPAs and SAT scores are lower, particularly when they are seen as contributing to the college's extramural sports programs (in many universities, competitive sports teams can produce significant revenues). When Ivy League schools switched to the new system in 1905, they would also send representatives to various schools around the country to interview prospective students. They didn't want too many "nerds." They wanted well-rounded, good-looking people—future leaders who would have an impact on the country and who would make these schools look good in return. And so they would conduct interviews and keep notes on whether an applicant was tall, handsome, or pretty (by whatever standard that was determined).

There were things the admissions office simply didn't like: people with big ears, for example. Short people were also undesirable, as recommendation files from that time indicate. In the mid-1950s, Harvard, Princeton, and Yale were actually keeping records on the number of men who entered the freshman class who were over six feet tall. Today, all schools release records about their incoming freshman classes, but they are more likely to keep track of race, class, and gender variables than height or ear size. Thus, answer choice *a* is incorrect if we are considering the present day; though physical appearance was at one time a salient aspect of college admissions criteria, it is generally no longer a consideration. Moreover, even the use of SATs is now being reconsidered by many colleges and universities, since there is evidence that

performance on such tests is closely linked to family income, education, and race. More than 1,800 accredited higher education institutions have now dropped their SAT requirements, including more than half of the highest-rated colleges in the *U.S. News & World Report* rankings, and resulting in greater student body diversity (Wood, 2022). All in all, the trend at universities has been toward creating a level playing field for applicants of all income levels, races, and educational background and thus reducing inequalities in society at large.

# 1 BASIC CONCEPTS

**Learn sociologists' explanations for achievement gaps among different groups of students.**

Before we delve into complex theories of the ways that education shapes our everyday lives, we first define several key concepts that are essential to our understanding of this major social institution.

## Achievement Gap: Components, Patterns, and Explanations

One of the core concepts in the sociology of education is the notion of educational inequalities, or achievement gap among different groups of students. This gap refers to the fact that certain groups, such as poor or working-class students, and certain minority groups, tend to receive lower scores on standardized tests and other measures of academic success (e.g., high school graduation rates and college admission rates) than do their more privileged counterparts. Sociologists have sought to explain achievement gaps in a variety of ways and have highlighted the importance of influences such as social background—particularly the educational and economic resources of one's parents—as well as intelligence.

Sociologist Sean Reardon has done extensive research on the achievement gap, identifying its sources and how it has changed over time. Throughout the second half of the twentieth century, the achievement gap between the richest and poorest children—those living in households in the 10th and 90th percentile of income distribution, respectively—increased dramatically. For children born in 2001, the class-based achievement gap is 30 to 40 percent greater than it was for children born in the 1970s. Today, the gap between rich and poor students is nearly twice as large as the well-documented achievement gap between Black and White ones (Reardon, 2011, 2012).

Parents with greater income are able to buy goods and services, such as expensive test-prep courses, that help their children succeed in school.

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Four explanations have been offered for the stark and growing socioeconomic gap in achievement (Reardon, 2012). First, middle- and upper-middle-class parents tend to invest more heavily in their children's cognitive development (by reading stories, playing word games, and consciously engaging them in activities explicitly related to intellectual development) than in their health, nutrition, or safety. Sociologist Julia Wrigley's (1989) analysis of parenting magazine articles throughout the twentieth century found that in recent decades children's cognitive development has become a major concern of middle-class parents, who see success in school as essential to a successful career. Second, income inequality has increased sharply throughout the late twentieth century, as we learned in Chapter 8. Reardon (2012) argues that those with greater income can buy the goods and services needed to help their child thrive in school. The benefits accrued to the "haves," in contrast to the "have-nots," have thus escalated considerably. Third, income is related to a range of other social resources that enable parents to support their children's intellectual development. Parents with education possess the specific skills and knowledge needed to help their children's performance in school. Income, too, is related to family structure, as we saw in Chapter 15. Co-residential married parents may have more time to

engage children in activities such as reading or writing (Reardon, 2012). Fourth, residential segregation on the basis of income rose throughout the late twentieth century. Today's wealthier families can afford homes in safer neighborhoods with higher-quality schools and more enrichment activities. As we shall see later in this chapter, neighborhoods and schools have the power to shape what, how, and how successfully children learn.

# Cognitive and Noncognitive Resources

Standardized and IQ tests may seem like simple concepts, but both are complex and potentially controversial. For years, psychologists, geneticists, statisticians, and others have debated whether any single human capability can be called intelligence, and if so, whether it rests on innately determined differences. The term *intelligence* as it is usually employed is difficult to define because it covers qualities that may be unrelated to each other. We might suppose, for example, that the "purest" form of intelligence is the ability to solve abstract mathematical puzzles. However, people who are very good at such puzzles sometimes show low capabilities in other areas, such as history or art. Scholars today increasingly believe in the existence of multiple forms of intelligence that pertain to different areas, such as art, music, language, interpersonal relations, and spatial skills, to name a few. Some scholars have also argued that emotional intelligence—generally defined as the ability to identify, assess, and control the emotions of oneself or others (Goleman, 1996)—is as important to professional and personal success as is the more intellect-based type (Gardner & Hatch, 1989).

Because the concept of intelligence has proven so resistant to definition, some psychologists have proposed (and many educators have by default accepted) that it should simply be regarded as "what the IQ (intelligence quotient) tests measure." Most IQ tests consist of a mixture of conceptual and computational problems. The tests are constructed in a way that the average score falls at 100 points: Thus, anyone scoring below that number is labeled "below-average intelligence," while anyone scoring above it is viewed as "above-average intelligence." Despite the fundamental difficulty of measuring intelligence, IQ tests are widely used in research studies as well as in schools and businesses. Nonetheless, sociologists remain critical and wary of the concept. Researchers have

found that IQ is powerfully affected by the socioeconomic resources of one's parents, thus calling into question the belief that intelligence is "innate" or "inborn" (Fischer et al., 1996). Later in this chapter, we will delve further into the debates surrounding the meaning of, and influences on, intelligence.

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**CONCEPT CHECKS**

1. **Why have many higher education institutions dropped their SAT requirements?**
2. **What is the "achievement gap"?**
3. **Define and contrast different types of intelligence.**

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# Glossary

achievement gap
: Disparity on a number of educational measures between the performance of groups of students, especially groups defined by gender, race, ethnicity, and socioeconomic status.

intelligence
: Level of intellectual ability, particularly as measured by IQ (intelligence quotient) tests.

emotional intelligence
: The ability to identify, assess, and control the emotions of oneself or others.

IQ (intelligence quotient)
: A score attained on tests of symbolic or reasoning abilities.

# 2 SOCIOLOGICAL THEORIES OF EDUCATION

**Understand the social functions of schooling. Learn three major sociological perspectives on the role of schooling in society.**

When we think of education, we tend to see it from an individual perspective. We may think of our own reasons for attending college: to cultivate our intelligence, enjoy a fun and social “college experience,” or prepare for a career. We also tend to think of education as a means of upward mobility. But sociologists look beyond individual students and their goals to connect these to the larger social functions of schools. We discuss three major sociological theories of the role schooling plays in the larger society: schooling as a process of assimilation or acculturation; schooling as a credentialing mechanism; and schooling as a process of social, or cultural, reproduction.

## Assimilation

The first perspective, schooling as a process of assimilation, focuses on what might be called the “official” curriculum and looks at questions such as how learning a common language and the facts of a common history and geography create a sense of “affinity” among members of society, which is something less than full consensus (Shils, 1972). The official curriculum promotes feelings of nationalism and is instrumental in the development of national societies, constituted of citizens from different regions who would then know the same history and speak a common language (Ramirez & Boli, 1987; Shils, 1972). In this approach, the content of education is particularly important in creating a common culture. For example, public schools historically have taught the children of immigrants about “American” foods, holidays, legends, and heroes to help them (and their immigrant parents) become fully steeped in our nation’s culture. But even children whose parents are part of the country’s dominant culture depend on the official curriculum to develop an image of themselves as Americans with a common history.

# Credentialism

A second influential perspective is credentialism. Adherents to this way of thinking place less emphasis on the content of an official curriculum. They argue that the specific skills and information that students learn in the classroom are much less relevant to their later achievements than the actual diploma. The primary social function of mass education derives from the need for degrees to determine one's credentials for a job, even if the work involved has nothing to do with the education one has received (Collins, 1979). Over time, the practice of credentialism results in demands for higher credentials, which require higher levels of educational attainment. Jobs that 30 years ago would have required a high school diploma, such as that of a sales representative, now require a college degree. Since educational attainment is closely related to class position, credentialism reinforces the class structure within a society.

# Hidden Curriculum

Practices such as the Pledge of Allegiance help promote feelings of nationalism among students.

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A third perspective, described as “critical” or Marxist, places the emphasis on social reproduction. In the context of education, social reproduction refers to the ways in which schools help perpetuate social and economic inequalities across the generations. A number of sociologists have argued that the hidden curriculum is the mechanism through which social reproduction occurs. The hidden curriculum refers to the idea that students from different social class backgrounds are provided different types of education, in terms of both curricular

materials and the kinds of interactions in which their teachers engage them. More specifically, the notion of the hidden curriculum suggests that the expansion of education was brought about by employers' needs for certain personality characteristics in their workers—self-discipline, dependability, punctuality, obedience, and the like—which are all taught in schools.

In their classic study of social reproduction, Samuel Bowles and Herbert Gintis (1976) provide an example of how the hidden curriculum works. They argue that modern education is a response to the economic needs of industrial capitalism. Schools help provide the technical and social skills industrial enterprise requires, and they instill discipline and respect for authority in the labor force. Schools also socialize children to get along with one another. Being able to "play well with others" is, after all, an important characteristic of a good worker.

Authority relations in school, which are hierarchical and place strong emphasis on obedience, directly parallel those dominating the workplace. The rewards and punishments held out in school also replicate those found in the world of work. Schools help motivate some individuals toward "achievement" and "success" while discouraging others, who find their way into low-paying jobs. You might even have noticed this in your own high school, where students from wealthier backgrounds took college-prep courses, while their classmates from more disadvantaged backgrounds were tracked into vocational programs. As noted earlier, institutions of higher learning tend to favor applicants who they believe are most likely to have successful careers after graduation.

Some sociologists view schooling as a response to the need for disciplined and obedient workers.

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A cruder way of putting this idea is that schools facilitate the ruling class's need to exploit a docile or cooperative workforce. Here the emphasis is on the fact that much of what students learn in school has nothing directly to do with the formal content of lessons. Schools, by the nature of the discipline and regimentation they entail, tend to teach students an uncritical acceptance of the existing social order. These lessons are not consciously taught; they are implicit in school procedures and organization. Thus, the hidden curriculum teaches children from underprivileged backgrounds that their role in life is "to know their place and to sit still with it" (Illich, 1983). Children spend long hours in school, and they learn a great deal more in the school context than is contained in the lessons they are actually taught. Children get an early taste of what the world of work will be like, learning that they are expected to be punctual and to apply themselves diligently to the tasks that those in authority set for them. From this perspective, even if a student in a poor inner-city school learned very little in her classes, the basic training she received in arriving on time for class would end up serving her well as a worker at a fast-food restaurant. Such an analysis can be quite depressing, but it may be a realistic way of understanding the place of education in the lives of such people.

Adherents to this perspective don't completely dismiss the content of the official curriculum. They accept that the development of mass education has had many beneficial consequences. Illiteracy rates are low compared with premodern times, and schooling provides access to learning experiences that are intrinsically self-fulfilling. Yet because education has expanded mainly as a response to economic needs, the school system falls far short of what enlightened reformers had hoped it would achieve. That is, according to this perspective, schooling has not become the "great equalizer"; rather, within the current economic and political system, schooling reproduces social-class stratification.

# Pierre Bourdieu and Cultural Capital

Another seminal figure who wrote about education and reproduction is French sociologist Pierre Bourdieu (1984, 1988), who argued that schools reproduce social-class inequality by rewarding certain cultural norms over others. Bourdieu's focus on the role of culture in the process of reproduction distinguished his theory from a strict Marxist analysis that focused on how schools mirrored and reproduced economic-class structures. For this reason, he used the term *cultural reproduction*. In relation to his theory of cultural reproduction, Bourdieu argued that people could possess many kinds of capital other than financial capital. Specifically, he was concerned with the existence of what he called cultural capital. That is, his theory of cultural reproduction proposes that middle- and upper-class children come to schools with a certain kind of cultural capital—speech patterns, demeanors, tastes, and so on—that the school values, and thus rewards. Bourdieu argues that children from low-income or working-class homes do not possess these same cultural characteristics and thus are placed at a disadvantage in schools.

Another important concept Bourdieu offers is the notion of habitus, which refers to a class-based set of dispositions, such as taste, language use, and demeanor. For Bourdieu, these dispositions are internalized unconsciously through social practices within one's social group. Put simply, poor and working-class children are socialized into a particular habitus—one that is not valued within the school system. In arguing that working-class individuals are unconsciously socialized into a working-class culture (and therefore are not likely to obtain the dispositions required for school success), Bourdieu, like Bowles and Gintis,

ultimately proposes a theory of reproduction in which the cycle of domination seems unbreakable.

Two students at a vocational high school in Florida learn how to wire a light switch. Career academies such as this one encourage students to work toward national industry certifications.

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These kinds of theories have been challenged by the notion of schools as contested spaces (Aronowitz & Giroux, 1985; Willis, 1977). It has been proposed that social reproduction does not happen without struggle or opposition from oppressed groups. Written over 40 years ago but still important today, Paul Willis's influential ethnographic study of working-class British youth known as "the lads" shows how working-class students exhibit an implicit understanding that schooling is not structured to benefit their group (industrial factory workers) as a whole. The lads express their understanding that schooling is not designed to better their own conditions as members of the working class, by embracing a working-class culture that valorizes manual labor and a counter-school culture. In doing so, they participate in the reproduction of their own class subordination. Willis suggests that these insights demonstrate that working-class youth are not passive dupes in the process of reproduction. Willis also suggests that the emphasis on the lads' control of their destiny points to possibilities for organized resistance. A number of subsequent studies of resistance in schooling in the United States (Foley, 1994;

McLaren, 1985; McLeod, 1995; Solomon, 1992; Valenzuela, 1999) have expanded our understanding of schools as contested spaces.

**Table 16.1 APPLYING SOCIOLOGY TO EDUCATION**

| CONCEPT | APPROACH TO EDUCATION | CURRENT APPLICATION |
|---|---|---|
| **Assimilation** | Education is important in creating a common culture. | Curricula in high schools across the country instill a common set of values in students regardless of their racial, ethnic, and religious differences. |
| **Credentialism** | The diploma one gets at graduation is more important than what a person learns in school. | Parents go to exorbitant lengths and costs to hire consultants who will help their children get into elite undergraduate schools although they can learn as much at a local state school. |

| CONCEPT | APPROACH TO EDUCATION | CURRENT APPLICATION |
|---|---|---|
| **Hidden curriculum** | Unspoken academic, social, and cultural messages are communicated to students while they are in school. | Some popular fashions and trends in minority communities are forbidden by school authorities, thereby implying that they are inferior to those of mainstream culture (e.g., bans on baggy pants). |
| **Cultural capital** | Some knowledge and tastes possessed by the elites are mainly learned at home and not taught in school. These can include highbrow culture like classical music or a rich vocabulary, or superior knowledge of how institutions work. | Parents' knowledge of the college admissions process can give their children a significant edge over less advantaged children of equal ability. |

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## CONCEPT CHECKS

1. **Contrast credentialism and social-reproduction perspectives on education.**
2. **How does the hidden curriculum serve to perpetuate social and economic inequalities?**
3. **What did Pierre Bourdieu mean by "cultural capital"?**

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# Glossary

hidden curriculum
: Traits of behavior or attitudes that are learned at school but not included in the formal curriculum—for example, gender differences.

cultural capital
: The accumulated cultural knowledge within a society that confers power and status.

# 3 RESEARCH ON EDUCATION TODAY

**Become familiar with the most important research on whether education reduces or perpetuates inequality. Learn the social and cultural influences on educational achievement.**

In the previous sections, we learned that the purpose and function of schooling have been viewed from a variety of perspectives. On the one hand, education has consistently been seen as a means of equalization. Access to universal education, it has been argued, could help reduce disparities in wealth and power. On the other hand, some theorists have argued that schools serve to perpetuate, or reproduce, inequalities. Are educational opportunities equal for everyone? Has education in fact proven to be a great equalizer?

There is a vast amount of research that examines these questions. Next, we outline some of the important research related to educational equality and differential outcomes (when one group consistently outperforms another group in terms of educational achievement). The concepts offered here help frame recent debates surrounding education in the United States. We also report on recent studies that help us understand the development and proliferation of the internet, and "digital gaps," or disparities in its access and use.

## Macrosocial Influences on Student Outcomes: Do Schools and Neighborhoods Matter?

Many of us believe that if we are intelligent and hardworking, and receive encouragement from our teachers, parents, and peers, we can succeed in school. This belief is true—to a point—but the types of schools we attend, the types of classes we take, and the experiences we have within those schools also may affect our lives. The notion that

schools may matter dates back to the classic studies of sociologist James Coleman in the 1960s. The ways that schools shape our daily lives both today and in our futures have been documented dramatically by author Jonathan Kozol. Yet a large and controversial body of research on school tracking emphasizes that even within a single school, one's outcomes are powerfully shaped by the types of classes to which one is assigned.

## Coleman's Study of Between-School Effects in American Education

The study of "between-school effects," or the ways students' experiences at School A differ from those at School B, has been the focus of sociological research for more than five decades. One of the classic investigations of educational inequality was undertaken in the United States in the 1960s. The Civil Rights Act of 1964 required the commissioner of education to prepare a report on educational inequalities resulting from differences in ethnic background, religion, and national origin. James Coleman, a sociologist, was appointed director of the research program. The outcome was a study based on one of the most extensive research projects ever carried out in sociology (Coleman et al., 1966).

Information was collected on more than half a million pupils who were given a range of achievement tests assessing verbal and nonverbal abilities, reading levels, and mathematical skills. Sixty thousand teachers also completed forms providing data for about 4,000 schools. The report found that a large majority of children went to schools that effectively segregated Black students from White students. Almost 80 percent of schools attended by White students contained only 10 percent or fewer African American students. White and Asian American students scored higher on achievement tests than did Blacks and other ethnic minority students. Coleman had supposed his results would also show that predominantly African American schools had worse facilities, larger classes, and more inferior buildings than predominantly White schools. But, surprisingly, the results showed far fewer differences of this type than had been anticipated.

Coleman, therefore, concluded that the material resources provided in schools made little difference to educational performance; the decisive influence was the children's backgrounds. The report stated, "Inequalities

imposed on children by their home, neighborhood, and peer environment are carried along to become the inequalities with which they confront adult life at the end of school" (Coleman et al., 1966). However, some evidence suggested that students from deprived backgrounds who formed close friendships with those from more favorable circumstances were likely to be more successful educationally.

Not long after Coleman's study, Christopher Jencks and his coworkers (1972) produced an equally celebrated work that reviewed empirical evidence accumulated on education and inequality up to the end of the 1960s. Jencks reaffirmed two of the earlier study's conclusions: First, educational and occupational attainment are governed mainly by family background and nonschool factors, and second, on their own, educational reforms can produce only minor effects on existing inequalities. Jencks's work has been criticized on methodological grounds, but the study's overall conclusions remain persuasive. Subsequent research has tended to confirm them.

## Children Left Behind

Between 1988 and 1990, the journalist Jonathan Kozol studied schools in about 30 neighborhoods around the United States. He used no special logic in choosing the schools, except that he went where he happened to know teachers, principals, or ministers. What startled him most was the segregation within these schools and the inequalities among them. Kozol brought these terrible conditions to the attention of the American people in his books, including *Savage Inequalities* (1991) and *Amazing Grace* (1995).

In his passionate opening chapter of *Savage Inequalities*, Kozol first took readers to East St. Louis, Illinois, a city that was 98 percent Black, had no regular trash collection, and had few jobs. Three-quarters of its residents were living on welfare at the time. City residents were forced to use their backyards as garbage dumps, which attracted a plague of flies and rats during the hot summer months. One resident told Kozol about "rats as big as puppies" that lived in his mother's yard. City residents also contended with fumes from two major chemical plants in the city. Another public health problem resulted from raw sewage, which regularly backed up into people's homes. East St. Louis had some of the sickest children in the United States, with extremely high rates of infant death, asthma, and poor

nutrition and extremely low rates of immunization. Only 55 percent of the children had been fully immunized for polio, diphtheria, measles, and whooping cough. Among the city's other social problems were crime, dilapidated housing, poor health care, and lack of education.

Kozol showed how the problems of the city often spilled over into the schools—in this case, literally. Over the course of two weeks, raw sewage backed up into the school on three occasions, each time requiring the evacuation of students and the cancellation of classes. Kozol documented other problems, which he argued stemmed from inadequate and disparate funding. Teachers often had to hold classes without chalk or paper. One teacher commented, "Our problems are severe. I don't even know where to begin. I have no materials with the exception of a single textbook given to each child. If I bring in anything else—books or tapes or magazines—I bring it in myself. The high school has no VCRs. They are such a crucial tool. So many good things run on public television. I can't make use of anything I see unless I unhook my VCR and bring it into school. The AV equipment in the school is so old that we are pressured not to use it." Comments from students reflected the same concerns. "I don't go to physics class, because my lab has no equipment," one student said. Another added, "The typewriters in my typing class don't work." Only 55 percent of the students in this high school ultimately graduated, and only about one-third of the graduates went on to college.

Kozol also wrote about the other end of the inequality spectrum, taking readers into a wealthy suburban school in Westchester County, outside New York City. This school had 96 computers for the 546 students. Most students studied a foreign language for four or five years. Two-thirds of the senior class were enrolled in an advanced placement (AP) class. Kozol visited an AP class to ask students about their perceptions of inequalities within the educational system. Students at this school were well aware of the economic advantages that they enjoyed at both home and school. In regard to their views about less-privileged students, the general consensus was that equal spending among schools was a worthy goal, but it would probably make little difference because poor students lacked motivation and would fail because of other problems. These students also realized that equalizing spending could have adverse effects on their school. As one student said, "If you equalize the money, someone's got to be short-changed. I don't doubt that [poor] children are

getting a bad deal. But do we want *everyone* to get a mediocre education?"

More than two decades later, Kozol went back and revisited the neighborhoods and children he studied to find out what had happened to them. His portraits are often depressing, with many of the children growing up to be troubled adults. Their lives often were derailed by alcohol abuse, unwanted pregnancies, murders, prison time, and even death by suicide. Yet Kozol did find that a handful of the students succeeded despite the odds. Most of these resilient children had been fortunate to have especially devoted parents, support from their religious community, or a serendipitous scholarship opportunity. As Kozol noted, "These children had unusual advantages: someone intervened in every case." For example, one young girl named Pineapple, whom Kozol met when she was a kindergartner, went on to graduate from college and become a social worker. Pineapple had attended a school that Kozol described as "almost always in a state of chaos because so many teachers did not stay for long." A local minister helped her get scholarships to private schools. The daughter of Spanish-speaking immigrants, Pineapple had to work hard to overcome deficits in reading, writing, and basic study skills, but she and her older sister both went on to become the first generation of their family to finish high school and attend college (Kozol, 2012).

> School funding typically comes from local property taxes, which means schools in poorer areas receive less money.

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While the personal tales of Pineapple and her sister are inspiring, Kozol's analyses reveal that very little has improved over the years. For example, there remain vast disparities between educational spending in largely Black and Latino central cities and largely White well-to-do suburbs. He reported that in 2002–2003, New York City spent $11,627 on each public school child, while in Nassau County, the towns of Manhasset and Great Neck spent $22,311 and $19,705, respectively. These patterns weren't limited to the New York area but rather were found throughout the United States. Because school funding tends to come from local property taxes, wealthier areas generate more funding for schools, while poorer neighborhoods with few lavish private homes have far less money for schools. As with his earlier studies of East St. Louis, Kozol visited schools that were just a few miles apart geographically but that offered vastly different educational opportunities. While suburban White schools would offer advanced math, literature, and an array of arts electives, the nearby primarily Black school would offer classes like hairdressing, typing, and auto shop. Ten years later, the situation hadn't changed: In 2019, the Chicago Ridge School District, where two-thirds of students come from low-income families, spent $10,987 per child. Less than an hour north, in a wealthy Chicago suburb, the Rondout District spent $31,491 per student (Illinois State Board of Education, 2019).

Kozol's poignant journalistic account of educational inequality has become part of our nation's conventional wisdom on the subject of educational inequality. But many sociologists have argued that although Kozol's 1991 book is a moving portrait, it provides an inaccurate and incomplete view of educational inequality. Why would Kozol's research not be compelling? There are several reasons, including the unsystematic way in which he chose the schools he studied. Other sociologists have proposed a variety of theories and have identified myriad factors contributing to inequality and differential outcomes.

## Tracking and Within-School Effects

Kozol's work vividly revealed the vast disparities between schools found in wealthy and impoverished school districts. Yet sociologists are also

interested in inequalities even within a single school. The practice of tracking, also known as ability grouping—dividing students into groups that receive different instruction on the basis of assumed similarities in ability or attainment—is common in American schools. In some schools, students are tracked only for certain subjects; in others, for all subjects. Sociologists have long believed that tracking is entirely negative in its effects and that its use partly explains why schooling seems to have little effect on existing social inequalities, since being placed in a particular track labels a student as either able or otherwise. As we have seen in the case of labeling and deviance, once attached, such labels are hard to break away from. Children from more privileged backgrounds, in which academic work is encouraged, are likely to find themselves in the higher tracks early on—and by and large stay there.

A now-classic study by Jeannie Oakes (1985) examined tracking in 25 junior and senior high schools, both large and small and in both urban and rural areas. She concentrated on differences within schools rather than between them. She found that although several schools claimed they did not track students, virtually all of them had mechanisms for sorting students into groups that seemed to be alike in ability and achievement, to make teaching easier. In other words, they employed tracking but did not choose to use the term *tracking*. Even where tracking existed only in this informal fashion, Oakes found strong labels developing—"high ability," "low-achieving," "slow," "average," and so on. Individual students in these groups came to be defined by teachers, other students, and themselves in terms of such labels. A student in a "high-achieving" group was considered a high-achieving person—smart and quick. Pupils in a "low-achieving" group came to be seen as slow and below average—or, in more colloquial terms, as "dummies." What was the effect of tracking on students in the low group? A subsequent study by Oakes (1990) found that these students received a poorer education in terms of the quality of the courses, teachers, and textbooks made available to them. Moreover, the negative effect of tracking affected mostly African American, Latino, and poor students.

The usual reason given for tracking is that bright children learn more quickly and effectively in a group of others who are equally able and that clever students are held back if placed in mixed groups. Surveying the evidence, Oakes attempted to show that these assumptions are wrong. The results of later research investigations are not wholly consistent, but

a pathbreaking study by sociologist Adam Gamoran and his colleagues (1995) concluded that Oakes was partially correct in her arguments. They agreed with Oakes's conclusions that tracking reinforces previously existing inequalities for average or poor students but countered her argument by asserting that tracking does have positive benefits for "advanced" students. The debate about the effects of tracking is sure to continue as scholars analyze more data.

## School Discipline

In the past two decades, scholars and educators have been increasingly interested in another aspect of school culture that may affect student outcomes: school discipline. Some sociologists have noted that there has been a shift in school discipline toward more punitive policies that mirror current trends in our nation's criminal justice system. Moreover, this shift has been most acute among schools located in poor areas and attended largely by members of ethnic minority groups.

A police officer walks a drug-sniffing dog through the halls of a school in Indianapolis. Opponents of punitive school-discipline policies claim they create a school-to-prison pipeline.

One of the major changes in school discipline came in 1995, when Congress amended the Gun-Free School Zones Act. This act, and subsequent federal mandates, established a "zero-tolerance" policy for weapons and drugs in schools. Zero tolerance was initially meant to address school violence by mandating suspension or expulsion for possession of drugs or weapons in school. However, as it was implemented nationwide, it was expanded to include a broad range of misbehavior. Critics of the policy argue that it has led to unnecessary police intervention in schools and has increased racial bias. For example, data from the U.S. Department of Education Office for Civil Rights (2018) show that while Black students represent only 15 percent of total enrollment, they account for 31 percent of students referred to law enforcement or subjected to a school-related arrest. Activists and educators opposed to zero tolerance have coined the term *school-to-prison pipeline* as a way of emphasizing the negative impact of the policy.

Disciplinary practices in schools, it has been argued, also appear to be influenced by media representations and negative images of Black and Latino youth. Ann Arnett Ferguson's (2000) ethnographic study of middle school children, for example, shows how institutional discourses (such as the use of prison metaphors), the subjective views of teachers, and the treatment Black boys receive in school influence the ways in which Black boys see themselves—that is, as criminally oriented.

Other researchers have noted that punitive school-discipline policies appear to be, in part, a response to low performance in inner-city schools populated by low-income, minority students. Based on ethnographic research in an urban school, Kathleen Nolan and Jean Anyon (2004) theorize that, within our current economy, criminalizing school-discipline policies are a means to manage an economically and educationally marginalized group. They also contend that when students embrace an oppositional culture, they may no longer be participating in the reproduction of their status as manual laborers, as Paul Willis (1977) argued. Instead, as misbehavior comes to be managed by the police in schools, students may be participating in the reproduction of themselves as "criminalized subjects," or as individuals who will spend a lifetime entangled in one way or another (incarceration, parole, probation) with the criminal justice system.

# Cultural and Social-Psychological Influences on Student Outcomes

Sociologists are not only interested in the ways schools and socioeconomic factors affect children's educational backgrounds; some are also interested in the ways cultural and psychological factors affect children's educational opportunities and outcomes. These explanations are typically invoked to explain race and gender differences in students' academic outcomes. In general, these theories propose that ethnic minorities and women are more likely than Whites and men to be socialized in a way that may disadvantage them in education (and in the workplace). Although race and gender disparities in many important educational outcomes have narrowed over the past half century, a number of gaps persist; sociologists are intent on figuring out why.

## Race and the "Acting White" Thesis

Black and Latino students lag behind White and Asian students in their rates of graduating from high school. Yet even at younger ages, an achievement gap has been documented. For example, analyses by the National Center for Education Statistics (NCES) in 2022 showed that Black and Hispanic students trailed their White peers by an average of more than 20 test-score points on the standardized math and reading assessments in the fourth and eighth grades (NCES, 2022c, 2022f). Although the score differentials between Black and White students persist, these achievement gaps have narrowed since 1992 in fourth-grade and eighth-grade reading assessments. However, score differentials between Black and White fourth-grade and eighth-grade math assessments during the same period have stayed the same or worsened. Between 1992 and 2020, score differentials for reading assessments narrowed between Hispanic and White students, but the achievement gap remained constant between Hispanic and White students for math assessment, and worsened considerably for eighth-grade students (NCES, 2020). There are also significant racial achievement gaps in SAT scores: In 2018, the average scores on the math section for Blacks (457) and Hispanics (477) were significantly lower than the average score of Whites (550) (NCES, 2021a).

In attempting to explain these declining yet persistent racial achievement gaps in education, anthropologists Signithia Fordham and John Ogbu (1986) proposed the "acting White" thesis. Based on ethnographic research of the educational experiences of Black students, Fordham and Ogbu concluded that the achievement gap can be partially explained by Black students' reluctance to embrace school norms, which Black students associate with White culture. In subsequent years, however, a number of researchers have challenged the "acting White" thesis. For example, Roslyn Mickelson's (1990) research on the achievement attitudes of African American students revealed that students held both abstract and concrete attitudes toward schooling. Their abstract attitudes were consistent with mainstream attitudes that placed a high value on education and the attainment of academic credentials for future success. However, these students also held concrete anti-achievement attitudes based on their experiences in school and their perception that they had few options in terms of entrance into higher education or lucrative careers even if they were to obtain a high school diploma.

More recently, sociologist Prudence Carter's (2005) study of the experiences of high school students in New York City revealed that Black and Latino students overwhelmingly believe in the importance of school and the need for educational credentials. Carter notes that Black and Latino students' academic and social experiences are heterogeneous, and the most successful students are not necessarily the ones who assimilate to White, mainstream speech patterns, styles, and tastes. Instead, students whom she calls cultural navigators—those who draw from resources from both their home culture and the mainstream culture—tend to be highly successful in school. Ultimately, Carter argues, schools must promote intercultural communication and understanding to mitigate unequal academic outcomes.

## Gender and Achievement

For many years, girls performed better on average than boys on standardized tests until they reached the middle years of secondary education. They then fell behind: Boys did better than girls, particularly in math and science. However, in recent years, we have seen a convergence and, in some cases, a reversal in the gender gap (College Board, 2016). In 2021, boys and girls scored roughly the same on the evidence-based reading and writing section of the SAT, while boys

outpaced girls by 19 points on math (537 versus 519) (NCES, 2021a). Moreover, girls are more likely than boys to attend a four-year college immediately following high school graduation, and this gap is particularly pronounced among African Americans. For example, in 2021, 43 percent of girls who completed high school enrolled in a four-year school compared to 33 percent of boys (NCES, 2023b). Since the mid-1990s, a higher proportion of women than men have graduated from four-year colleges each year (Pollard, 2011).

Given this evidence, most scholars concur that today's gender gap places girls ahead of boys. Sociologists have attempted to explain the reversal in the gender gap in a variety of ways. Some have argued that girls are doing better in schools today because the new service economy has created more opportunities for women, while factory jobs, traditionally a male terrain, have decreased in number because of new technologies and the relocation of manufacturing industries to developing countries. Other studies focus on the achievements made within the women's movement and its effect on women's self-esteem and expectations. Another important impact of the women's movement is that teachers have become more aware of gender discrimination in the classroom and have taken steps to avoid gender stereotyping. Many teachers now incorporate learning materials that are free of gender bias, and they encourage girls to explore traditionally "male" subjects.

Some sociologists today are wary of all the attention directed at underachieving boys. They contend that, although girls have forged ahead, they are still less likely than boys to choose subjects in school that lead to careers in science, technology, engineering, and mathematics (STEM). In 2016, women accounted for 36 percent of degrees in STEM fields (NCES, 2019c). Boys pull away from girls by about age 11 in science and continue to outperform girls through college. And women continue to be disadvantaged in the job market even though they are entering college at higher rates than young men. The question of "Who fares worse, boys or girls?" will continue to challenge social scientists and educators in future generations as they strive to develop programs and policies to enhance gender equity.

## Stereotype Threat

Differential outcomes between White students and minority students and between girls and boys have also been explained in social psychological terms. Claude Steele and Joshua Aronson's (1995, 2004) influential work on stereotype threat suggests that when African American students (or female students) believe they are being judged not as individuals but as members of a negatively stereotyped social group, they will do worse on tests. Conversely, students who believe they are judged as members of a positively stereotyped group have been found to do better on tests. Sociologist Jennifer Lee refers to this as stereotype promise, a phenomenon she detected among Asian American students. The Chinese American and Vietnamese American students she tracked talked about how their teachers assumed that they were smart, hardworking achievers. These perceptions affected the way their teachers treated them, the grades they received, and their chances of securing slots in their schools' most competitive programs, like AP classes (Lee & Zhou, 2014).

# Public Policy Influences on Student Outcomes

We have described the ways in which macrosocial factors such as social class and school organization, as well as microsocial processes such as stereotype threat and stereotype promise, may account for educational inequalities. However, a third set of factors also has a powerful influence on student outcomes: public policies.

## Educational Reform in the United States

Sociological research has played a major role in reforming the educational system. These reforms, in turn, have had a powerful impact on the lives of children who are affected by such policies. The object of James Coleman's research, commissioned as part of the 1964 Civil Rights Act, was not solely academic; it was undertaken to influence policy—and it succeeded. On the basis of the act, the courts decided that segregated schools violated the rights of minority pupils. But rather than attacking the origins of educational inequalities directly, as Christopher Jencks's later work suggested was necessary, the courts decided that the schools in each district should achieve a similar racial balance. Thus began the practice of busing students to other schools.

In 1970, a U.S. judge in North Carolina ordered that Black students be bused to White schools and that White students be bused to Black schools. It was hoped that this crosstown school busing would end the de facto segregation of public schools caused by White students living in predominantly White neighborhoods and Black students living in predominantly Black neighborhoods.

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Busing provoked a great deal of opposition, particularly from parents and children in White areas, and led to episodes of violence at the gates of

schools where the children were bused in from other neighborhoods. White children paraded with placards reading, “We don’t want them!” Still, busing met with a good deal of success, reducing levels of school segregation quite steeply, particularly in the South. But busing also produced a number of unintended consequences. Some White parents reacted to busing by either putting their children into private schools or moving to mainly White suburbs where busing wasn’t practiced. As a result, in the cities, some schools are virtually as segregated as the old schools had been in the past. Busing, however, was only one factor prompting the “White flight” to the suburbs. Whites also left as a reaction to urban decay: to escape city crowding, housing problems, and rising crime rates.

One important target of educational policy today is improving levels of functional literacy. Literacy is more than the ability to read and write; literacy is also the ability to process complex information in our increasingly technology-focused society. The National Center for Education Statistics breaks literacy into three components: prose literacy, document literacy, and quantitative literacy. Prose literacy means that a person can look at a short piece of text to get a small piece of uncomplicated information. Document literacy refers to a person’s ability to locate and use information in forms, schedules, charts, graphs, and other informational tables. Quantitative literacy is the ability to do simple addition. In the United States today, only 13 percent of the population is proficient in these three areas (Kutner et al., 2007). Of course, the United States is a country of immigrants, who, when they arrive, may not be able to read and write, and who may also have trouble with English. But this doesn’t explain why the United States has higher levels of functional illiteracy than most other industrial countries; many functionally illiterate people are not recent immigrants at all.

Former secretary of education Betsy DeVos was a vocal advocate of school choice. This movement seeks to use federal funds to expand options outside the traditional public school system, including charter schools such as this one in New York City.

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What is to be done? Some educators have argued that the most important change that needs to be made is to improve the quality of teaching, either by increasing teachers' pay or introducing performance-related pay scales, with higher salaries going to the teachers who are most effective in the classroom. Others have proposed giving schools more control over their budgets (a reform that Britain has implemented). The idea is that more responsibility for, and control over, budgeting decisions will create a greater drive to improve the school. Further proposals include the re-funding of federal programs such as Head Start to ensure healthy early child development and thus save millions of dollars in later costs. Others have called for the privatization of public education, a proposal that has gained numerous supporters in recent years, including the secretary of education under President Trump, Betsy DeVos.

## Education Policy Today

Education has long been a political battleground. In the 1960s, some politicians, educators, and community activists pushed for greater

equality and universal access to education through such initiatives as bilingual education programs, multicultural education, open admissions to college, the establishment of ethnic studies programs on campuses, and more equitable funding schemes. Such initiatives were seen as supporting civil rights and equality. Educational policies in the twenty-first century have similarly intended to provide quality education for all children and to close the achievement gap. However, scholars disagree about how successful recent policies have been in meeting this goal.

The most significant piece of federal legislation influencing education in the past three decades was the No Child Left Behind (NCLB) Act enacted by Congress in 2001 and signed into law by President George W. Bush in 2002. NCLB reauthorized the 1965 Elementary and Secondary Education Act but also expanded it by implementing a host of policies meant to improve academic outcomes for all children and close the achievement gap. Indeed, NCLB was the most expansive and comprehensive piece of education legislation passed since 1965, addressing virtually every aspect of education—including, for example, testing, school choice, teacher quality, the education of English language learners, military recruitment in schools, and school discipline. At the top of its agenda was instituting standardized testing as a means of measuring students' academic performance. The act also provided a strong push for school choice—that is, in the spirit of competition, parents were given choices about where to send their children to school. Low-performing schools, at risk of losing students, thus jeopardized their funding and risked being closed. Another significant implication of NCLB was that, for the first time since 1968, states were not required to offer non-English-speaking students bilingual education. Instead, the act emphasized learning English over using students' native language and favored English-only program models. NCLB also provided support for a zero-tolerance approach to school discipline that was first mandated in the 1990 Gun-Free School Zone Act.

The NCLB was widely criticized for requiring teachers to "teach to the test." Critics argued that the emphasis on standardized testing—that is, a system in which all students in a state take the same test under the same conditions—as the means of assessment encouraged teachers to teach a narrow set of skills that would increase students' test performance, rather than help them acquire an in-depth understanding of important concepts and skills (Hursh, 2007). Others condemned the program as a punitive

model of school reform (i.e., teachers and principals at underperforming schools risked job loss) and noted that achievement gaps did not change and that the policy neglected the important fact that the broader socioeconomic context affects school functioning.

In 2012, recognizing that NCLB might not be effective for all school systems, President Barack Obama granted waivers from NCLB requirements to 32 states, allowing them to develop their own standards and exempting them from the 2014 targets set by the law. In exchange for that flexibility, those states "agreed to raise standards, improve accountability, and undertake essential reforms to improve teacher effectiveness," the White House said in a statement. The Obama administration also implemented its own program, called Race to the Top, a competitive grant program designed to spur innovation and reform in K–12 education. The program rewarded states that demonstrated improvements in student outcomes, including closing achievement gaps, increasing graduation rates, and better preparing students for college. States competing for the more than $4 billion in grant money had to outline plans for developing and adopting common standards and assessments; building data systems that track student growth; recruiting and retaining high-quality teachers and administrators; and improving the lowest-achieving schools.

Like NCLB, however, Race to the Top was roundly criticized for relying too heavily on high-stakes testing and also failing to address the true causes of low student achievement, namely poverty and lack of opportunity. Teachers' unions and educators also complained that the tests were an inaccurate way to measure teachers, and that such measures hadn't worked in the past. Political conservatives said that Race to the Top imposed federal control on state schools. Critics said that high-stakes testing is unreliable, that charter schools weaken public education, or that the federal government should not influence local schools (Dillon, 2010). And in 2015, at the end of his presidency, Obama replaced NCLB entirely with a much weaker act, dubbed Every Student Succeeds, which retained standardized testing but ceded control to states and school districts.

The crisis in American schools won't be solved in the short term, and it won't be solved by educational reforms alone, no matter how expansive. In fact, a 2006 study by the U.S. Department of Education found that schools identified for improvement were disproportionately urban, high-

poverty schools, and that “school poverty and district size better predicted existing improvement status than the improvement strategies undertaken by the schools” (U.S. Department of Education, 2006). A further unintended consequence of the current emphasis on testing is that schools have narrowed their course offerings to focus much more heavily on tested subject areas while cutting time in science, social studies, music, art, and physical education (McMurrer, 2007).

Programs like No Child Left Behind and Race to the Top had been criticized for relying too heavily on standardized testing, which encourages teachers to “teach to the test.”

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The lesson of sociological research is that inequalities and barriers in educational opportunity reflect wider social divisions and tensions. While the United States remains wracked by racial tensions, and the polarization between decaying cities and affluent suburbs persists, the crisis in the school system is likely to prove difficult to turn around. Jean Anyon’s (2006) analysis of how political and economic forces influence schooling helps clarify these challenges. Anyon argues that schools will not improve until educational reform is linked to more sweeping economic reforms, such as job creation and training programs and corporate tax reform.

# Global Perspectives: Education and Literacy in the Developing World

You have already learned about vast educational inequalities in the United States. However, from a global perspective, another disparity is of tremendous concern: cross-national disparities in literacy. Without literacy, schooling cannot proceed; it is the “baseline” of education. We take it for granted in the West that the majority of people are literate, but this is only a recent development in Western history, and in previous times no more than a tiny proportion of the population had any literacy skills.

Today, roughly 13 percent of the world population over the age of 15, or 773 million persons, is illiterate—and two-thirds of them are women (Buchholz, 2022). However, younger generations are faring better than their parents; youth literacy rates in nearly every region of the world are higher than adult literacy rates—although these generational gaps vary widely by region. Youth literacy rates refer to persons ages 15 to 24, while adult literacy rates apply to the population age 15 and older. Worldwide, the lowest literacy rates are observed in sub-Saharan Africa (65 percent of adults and 76 percent of youth) and in South and West Asia (73 percent of adults and 90 percent of youth) (Global Map 16.1) (Our World in Data, 2021). However, even within regions, there is great heterogeneity; for example, adult literacy rates range from just 30 percent in Guinea to 95 percent in Equatorial Guinea. By contrast, East Asia, Central Asia, and Central and Eastern Europe enjoy literacy rates of nearly 100 percent (UNESCO Institute for Statistics, 2017).

What accounts for these marked gaps in global literacy rates? Sociologists believe that these patterns are best understood in a historical perspective and reflect enduring consequences of colonialism. During the period of colonialism, governments regarded education with some trepidation. Until the twentieth century, most colonial governments believed Indigenous populations were too primitive to be worth educating. Later, education was seen as a way of making local elites responsive to European interests and ways of life. But, to some extent, the result was to spark discontent and rebellion. The majority of those who led anticolonial and nationalist movements were educated elites who had attended schools or colleges in Europe; they were able to compare

firsthand the democratic institutions of the European countries with the absence of democracy in their lands of origin.

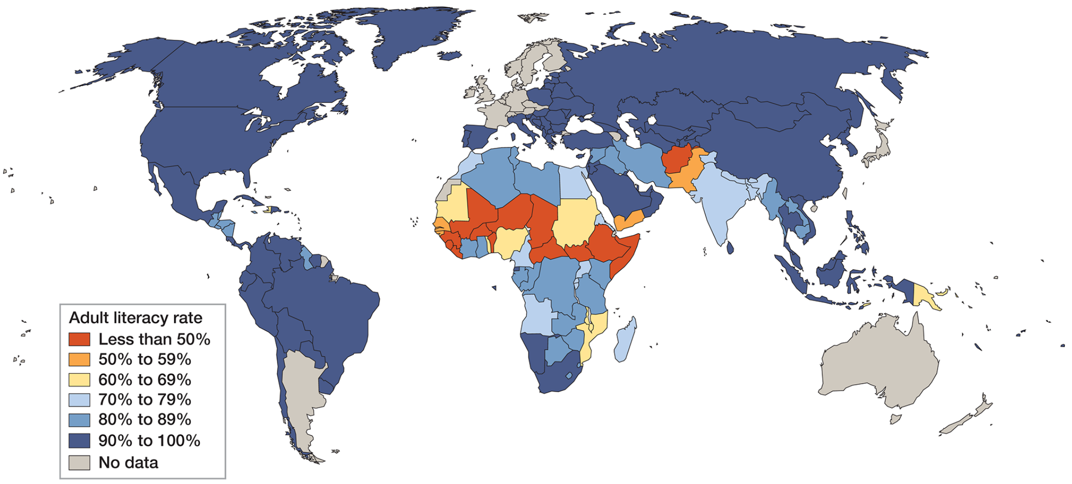
The education that the colonizers introduced usually pertained to Europe, not the colonial areas themselves. Educated Africans in the British colonies knew about the kings and queens of England and read Shakespeare and Milton, but they knew next to nothing about their own countries' histories or past cultural achievements. Policies of educational reform since the end of colonialism have not completely altered the situation, even today.

Partly as a result of the legacy of colonial education, which was not directed toward the majority of the population, the educational system in many developing countries is top-heavy: Higher education is disproportionately developed relative to primary and secondary education. The result is a correspondingly overqualified group who, having attended colleges and universities, cannot find White-collar or professional jobs. Given the low level of industrial development, most of the better-paid positions are in government, and there are not enough of those to go around.

Global Map 16.1

**ADULT LITERACY RATES WORLDWIDE (15 YEARS AND OLDER)**

*Despite significant gains in reducing global illiteracy rates, more than 750 million adults worldwide still lack basic reading and writing skills. More than half of the global illiterate population resides in southern Asia and another quarter lives in sub-Saharan Africa.*




Source: Our World in Data, 2021.

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In recent years, some developing countries, recognizing the shortcomings of the curricula inherited from colonialism, have tried to redirect their educational programs toward the rural poor in an effort to raise literacy rates. They have had limited success because usually there is insufficient funding to pay for the scale of the necessary innovations. As a result, countries such as India have begun programs of self-help education. Communities draw on existing resources without creating demands for high levels of finance. Those who can read and write and who perhaps possess job skills are encouraged to take others on as apprentices, whom they coach in their spare time.

# The Impact of the Media and Educational Technology on Everyday Life

While we spend hours a day using technology for fun and for socializing, technology also has shaped where, how, and with whom we learn. The spread of information technology looks set to influence education in several different ways. New technologies are already affecting the nature of work, replacing humans with machines in some types of work. The sheer pace of technological change is creating a much more rapid turnover of jobs than once was the case. Education can no longer be regarded as a stage of preparation before an individual enters work. As

technology changes, necessary skills change, and even if education is seen from a purely vocational point of view—as providing skills relevant to work—most observers agree that people will need lifelong exposure to education in the future.

## Technologies of Education

The rise of education in its modern sense was connected with several other major changes in the nineteenth century. One was the development of the school. One might naïvely think that there was a demand for education and that schools and universities were set up to meet that demand. But that was not how things happened. Schools arose, as Michel Foucault (1975) has shown, as part of the administrative apparatus of the modern state. The hidden curriculum was about discipline and the control of children.

A second influence was the development of printing and the arrival of "book culture." The mass distribution of books, newspapers, and other printed media was as distinctive a feature of the development of industrial society as were machines and factories. Education developed to provide skills of literacy and computation, giving people access to the world of printed media. Nothing is more characteristic of the school than the schoolbook or textbook.

As in many other areas of contemporary social life, markets and information technology are major influences on educational change. The commercializing and marketizing of education also reflect such pressures. Schools are being reengineered to resemble business corporations. Many of those likely to enter the education field will be organizations whose relation to schooling was previously marginal or nonexistent. These include cable companies, software houses, telecommunication groups, filmmakers, and equipment suppliers. Their influence will not be limited to schools or universities. They are already forming part of what has been called "edutainment"—a sort of parallel education industry linked to the software industry in general and to museums, science parks, and heritage areas.

## Education and the Technology Gap

Whether these new technologies will have the radical implications for education that some claim is still an open question. Critics have pointed out that, even if they do have major effects, these technologies may act to reinforce educational inequalities. Information poverty might be added to the material deprivations that currently have such an effect on schooling. The sheer pace of technological change and the demand of employers for computer-literate workers may mean that those who are technologically competent “leapfrog” over people who have little experience with computers.

Some already fear the emergence of a “computer underclass” within Western societies. Although developed countries have the highest levels of computer and internet usage in the world, there are stark inequalities in computer use within those societies. Many schools and colleges are suffering from underfunding and long-standing neglect; even if these institutions become beneficiaries of schemes that distribute secondhand computer hardware to schools, they must gain the technical expertise and ability to teach information technology skills to pupils. Because the market for computer specialists is so strong, many schools are struggling to attract and keep information-technology teachers, who can earn far greater incomes in the private sector.

Such inequalities came to the fore during the 2020 pandemic, when K–12 schools across the nation were forced to switch to remote learning and the advantages of well-funded public schools became far more obvious. Since many of the students in such schools already resided in households with electronic devices, administrators could afford to provide the small number of needy students with the equipment required to participate in remote learning. But many heavily populated or financially strapped districts could not afford to do so. The public school system in New York City—the epicenter of the pandemic when schools initially transitioned to remote learning—employs 75,000 educators and administrators and accommodates 1 million K–12 students. It was able to supply 175,000 children with laptops, iPads, and Chromebooks but left thousands of others with nothing more than paper packets.

Moreover, access to a device was not necessarily a solution to the problem since 6 to 7 million schoolchildren across the country lived in households with no internet connection. As all libraries and institutions with public Wi-Fi were on lockdown, such students were incapable of making the switch from live to virtual classroom. For this reason, school

districts with large numbers of students too poor to afford computers, tablets, or broadband service were forced to resort to other options. In Memphis, Tennessee, for example, where two-thirds of students lacked any type of digital device (including cell phones) and one-third had no internet access, classes were broadcast over a local TV channel.

Though serious, the technology gap in Western societies seems minor when compared to the digital divide separating Western classrooms from their counterparts in the developing world. As the global economy becomes increasingly knowledge based, there is a real danger that poorer countries will become even more marginalized because of the gap between the information rich and the information poor. Internet access has become a new line of demarcation between the rich and the poor. Information-technology enthusiasts argue that computers need not result in greater national and global inequalities—that their very strength lies in their ability to draw people together and to open up new opportunities. Schools in Asia and Africa that lack textbooks and qualified teachers can benefit from the internet, it is claimed. Distance-learning programs and collaboration with colleagues overseas could be the key to overcoming poverty and disadvantage. When technology is put in the hands of smart, creative people, its proponents argue, the potential is limitless.

Technology can be breathtaking and can open important doors, but there is no such thing as an easy “techno-fix.” Underdeveloped regions that struggle with mass illiteracy and lack telephone lines and electricity need an improved educational infrastructure before they can truly benefit from distance-learning programs. The internet cannot be substituted for direct contact between teachers and pupils under these conditions.

Students in a school in the remote Thai highlands use tablets to practice English. While technology is transforming classrooms across the globe, there remains a significant digital divide.

## Lifelong Learning

New technologies and the rise of the knowledge economy are transforming traditional ideas about work and education. Training and the attainment of qualifications now occur throughout people's lives, rather than just early in life. Mid-career professionals are choosing to update their skills through continuing-education programs and online courses. Many employers now allow workers to participate in on-the-job training as a way of enhancing loyalty and improving the company's skill base.

As our society continues to transform, the traditional beliefs and institutions that underpin it are also undergoing change. The idea of education—implying the structured transmission of knowledge within a formal institution—is giving way to a broader notion of learning that takes place in diverse settings. The shift from education to learning is not an inconsequential one. Learners are active, curious social actors who can derive insights from a multiplicity of sources, not just within an institutional setting. An emphasis on learning acknowledges that skills and knowledge can be gained through all types of encounters—with

friends and neighbors, at seminars and museums, in conversations at the local coffee shop, via the internet and other media, and so forth.

The shift in emphasis toward lifelong learning can already be seen within schools themselves, where there is a growing number of opportunities for pupils to learn outside the confines of the classroom. The boundaries between schools and the outside world are breaking down, not only via cyberspace, but in the physical world as well. “Service learning,” for example, has become a mainstay of many American secondary schools. As part of their graduation requirements, pupils devote a certain amount of time to volunteer work in the community. Partnerships with local businesses have also become commonplace in the United States, fostering interaction and mentor relationships between adult professionals and pupils.

Lifelong learning should and must play a role in the move toward a knowledge society. Not only is learning essential to a well-trained, motivated workforce, but it should also be seen in relation to wider human values. Learning is both a means and an end to the development of a well-rounded and autonomous self-education in the service of self-development and self-understanding. There is nothing utopian in this idea; indeed, it reflects the humanistic ideals of education developed by educational philosophers. An example already in existence is lifelong-learning programs for the age 65+ population, which provide retired people with the opportunity to educate themselves as they choose, developing whatever interests they care to follow.

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## CONCEPT CHECKS

1. **How do Coleman’s findings differ from the results of Kozol’s research? Whose theory, in your opinion, can better explain race and class gaps in educational achievement?**
2. **What effect does tracking have on academic achievement?**
3. **Explain two theories that sociologists have developed to account for the ways that cultural and psychological factors affect educational outcomes.**
4. **What were the goals of No Child Left Behind and Race to the Top? What were criticisms of these policies?**
5. **What are some of the reasons there are high rates of illiteracy in developing nations?**

# Glossary

tracking
: Dividing students into groups that receive different instruction on the basis of assumed similarities in ability or attainment.

“acting White” thesis
: The thesis that Black students do not aspire or strive to get good grades because it is perceived as “acting White.”

abstract and concrete attitudes
: Abstract attitudes are ideas that are consistent with mainstream societal views, while concrete attitudes are ideas that are based on actual experience.

cultural navigators
: People who draw from both their home culture and mainstream culture to create an attitude that allows them to succeed.

gender gap
: The differences between women and men, especially as reflected in social, political, intellectual, cultural, or economic attainments or attitudes.

stereotype threat
: The idea that when African American students believe they are being judged not as individuals but as members of a negatively stereotyped social group, they will do worse on tests.

stereotype promise
: A phenomenon where being viewed through the lens of a positive stereotype may lead one to perform in such a way that confirms the positive stereotype, thereby enhancing performance.

functional literacy
: Reading and writing skills that are beyond a basic level and are sufficient to manage one’s everyday activities and employment tasks.

standardized testing
: A system in which all students take the same test under the same conditions.

information poverty
: The state of people who have little or no access to information technology, such as computers.

cyberspace

Electronic networks of interaction between individuals at different computer terminals.

# 4 UNANSWERED QUESTIONS

**Learn about some of the current educational issues that concern sociologists, including the debate over the sources of IQ, the merits of homeschooling, and the benefits of international education.**

As you have learned in this chapter, the sociological study of education is a rapidly evolving field. With each new technological development or the implementation of a new public policy, new issues and challenges arise. Sociologists continue to grapple with important questions about education, and answers to these questions are often challenging and contested. We focus here on three “unanswered” questions: Is intelligence shaped by genes or environment? Is homeschooling a substitute for traditional schooling? And who benefits from “international education”?

## Is Intelligence Shaped by Genes or Environment?

What social or biological factors shape how “intelligent” we are? This question has been at the center of hotly contested debates for nearly five decades. Understanding the sources of IQ is an important goal for educational researchers, because scores on IQ tests correlate highly with academic performance (which is not surprising, given that IQ tests were originally developed to predict success in school). They therefore also correlate closely with social, economic, and ethnic differences because these are associated with variations in levels of educational attainment. Another reason scholars are interested in factors that shape IQ is this information may help remedy the achievement gap we learned about earlier in this chapter. White students score better, on average, than African Americans or members of other disadvantaged minorities. An article published by Arthur Jensen in 1969 caused a furor by attributing IQ differences between Blacks and Whites in part to genetic variations (see also Jensen, 1979). Most sociologists argue that such attributions are incomplete and misleading.

Later, Richard J. Herrnstein, a psychologist, and Charles Murray, a sociologist, reopened the debate about IQ in a controversial way. They argued in their book *The Bell Curve* (1994) that the accumulated evidence linking IQ to genetic inheritance was now overwhelming. The significant differences in intelligence among various racial and ethnic groups, they said, must in part be explained in terms of heredity. According to Herrnstein and Murray, the available evidence strongly indicated that some ethnic groups on average had higher IQs than other groups. Asian Americans, particularly Japanese Americans and Chinese Americans, on average possessed higher IQs than Whites, although the difference was not large. The average IQs of Asians and Whites, however, were substantially higher than those of Blacks. Summarizing the findings of 156 studies, Herrnstein and Murray found an average difference of 16 IQ points between these two racial groups. The authors argued that such differences in inherited intelligence contributed in an important way to social divisions in American society. The smarter an individual is, the greater the chance they will rise in the social scale. Those at the top are there partly because they are smarter than the rest of the population—from which it follows that those at the bottom remain there because, on average, they are not as smart.

Herrnstein and Murray's claim created a great deal of controversy and raised the ire and indignation of countless liberals, social scientists, and members of the African American community. Although Herrnstein and Murray's claims may be seen as racist and reprehensible, are these sufficient reasons to attack their work? Or are their conclusions based on faulty social research? The answer to both questions is a resounding yes. A team of sociologists at the University of California at Berkeley later reanalyzed much of the data that Herrnstein and Murray had based their conclusions on and came up with quite different findings.

In the original analysis, Herrnstein and Murray analyzed data from the National Longitudinal Study of Youth (NLSY), a survey of more than 10,000 young Americans who were interviewed multiple times over a period of more than a decade. As part of this study, subjects were given the Armed Forces Qualifying Test (AFQT), a short test that assesses IQ. Herrnstein and Murray then conducted statistical analyses, which used the AFQT score to predict a variety of outcomes. They concluded that having a high IQ was the best predictor of later economic success and that low IQ was the best predictor of poverty later in life. The Berkeley

sociologists, in their 1996 book *Inequality by Design* (Fischer et al., 1996), countered that the AFQT does not necessarily measure intelligence, but instead measures how much a person has learned in school. Moreover, they found that intelligence is only one factor among several that predicts how well people do in life. Social factors, including education, gender, community conditions, marital status, current economic conditions, and (perhaps most important) parents' socioeconomic status, better predict one's occupational and economic success.

In the original analysis, Herrnstein and Murray measured parents' socioeconomic status by taking an average of mother's education, father's education, father's occupation, and family income. The Berkeley sociologists recognized that each of these four factors matters differently in predicting a child's occupational outcomes and thus weighted the four components differently. Their analysis showed that the effects of socioeconomic background on a young adult's risk of later poverty were substantially greater than Herrnstein and Murray originally found. The Berkeley sociologists also recognized that IQ is closely associated with one's level of education. They reanalyzed the NLSY data, taking into consideration the individual's level of education, and found that Herrnstein and Murray had drastically overestimated the effects of IQ on a person's later achievements.

The relationship between race and intelligence is also best explained by social rather than biological causes, according to the Berkeley sociologists. All societies have oppressed ethnic groups. Low status, often coupled with discrimination and mistreatment, leads to socioeconomic deprivation, group segregation, and a stigma of inferiority. The combination of these forces often prevents racial minorities from obtaining a quality education, and, consequently, their scores on standardized intelligence tests are lower.

The average lower IQ score of African Americans in the United States is remarkably similar to that of deprived ethnic minorities in other countries —such as the Dalits in India (who are at the very bottom of the caste system), the Maori in New Zealand, and the *burakumin* of Japan. Children in these groups score an average of 10 to 15 IQ points below children belonging to the ethnic majority. The *burakumin*—descendants of people who, in the eighteenth century, as a result of local wars, were dispossessed from their land and became outcasts and vagrants—are a

particularly interesting example. They are not in any way physically distinct from other Japanese, although they have suffered from prejudice and discrimination for centuries. In this case, the difference in average IQ results cannot derive from genetic variations because there are no genetic differences between them and the majority population; yet the IQ difference is as thoroughly fixed as that between Blacks and Whites. *Burakumin* children in the United States, where they are treated like other Japanese, do as well on IQ tests as other Japanese children.

Such observations strongly suggest that the IQ variations between African Americans and Whites in the United States result from social and cultural differences. This conclusion receives further support from a comparative study of 14 nations (including the United States) showing that average IQ scores have risen substantially over the past half century for the population as a whole (Coleman, 1987). IQ tests are regularly updated. When old and new versions of the tests are given to the same group of people, they score significantly higher on the old tests. Present-day children taking IQ tests from the 1930s outscored 1930s groups by an average of 15 points—just the kind of average difference that currently separates Blacks and Whites. Children today are not innately superior in intelligence to their parents or grandparents; the shift presumably derives from increasing prosperity and social advantages. The average social and economic gap between Whites and African Americans is at least as great as that between the different generations and is sufficient to explain the variation in IQ scores. Although genetic variations between individuals may influence scores on IQ tests, these have no overall connection to racial differences.

# Is Homeschooling a Substitute for Traditional Schooling?

Homeschooling has increased dramatically in popularity in recent decades. Between 1999 and 2012, the number of students who were homeschooled more than doubled, with an estimated 3.4 percent of all children not attending traditional public or private schools; by 2019, that number had fallen to 2.8 percent (NCES, 2022b). Homeschooling means that children are taught by their parents, guardians, or a team of adults who oversee their educational development. The curricula that homeschooled children follow vary widely from state to state, with some

states mandating quite strict ones and others far more lax ones, offering parents greater leeway.

A survey conducted by the U.S. Department of Education in 2019 queried parents about their motivations for homeschooling their children. The most frequently cited reasons were a concern about the school environment (80 percent), a desire to provide moral instruction (75 percent), emphasis on family life together (75 percent), and dissatisfaction with the academic instruction at other schools (73 percent) (NCES, 2022b). It remains to be seen how well homeschooling prepares young adults for the future challenges of college or employment in the United States. Some studies suggest that homeschooled children are just as well prepared for college as their traditionally educated counterparts, while others say that homeschooling deprives children of important life lessons.

Before we can ascertain whether homeschooling is beneficial, we need to consider that homeschooling is a "selective" process, and the traits that "select" people into homeschooling may also affect their later prospects. White students have a higher homeschooling rate than Blacks and Hispanics; fully 4 percent of homeschooled students in 2021 were White compared to 1.2 percent of Black students and 1.9 percent of Hispanic students (NCES, 2022b). In addition, students in two-parent households make up 80 percent of the homeschooled population, and those in two-parent households with one parent in the labor force make up 55 percent of the homeschooled population (NCES, 2018b). Students in households earning between $25,001 and $75,000 per year had higher rates of homeschooling than their peers in households earning $25,000 or less a year. Thus, many children who are homeschooled have several social advantages, including wealthier or more stable families.

The impossibility of homeschooling a larger segment of the population became evident during the 2020 Covid-19 epidemic, when parents across the United States were unexpectedly forced to play a far more significant role in their children's education after K–12 schools closed their doors for an undetermined period. Although classes were conducted remotely, via online platforms, television broadcasts, and paper pamphlets, parents were called on to supervise their children's progress and assume many of the responsibilities of teachers. Those with the homeschooling experience suddenly became wellsprings of information and advice (Kamenetz & Turner, 2020; Rummel, 2020; Willen, 2020), which, however well-

intentioned, was often irrelevant or useless to parents without the knowledge, temperament, and vocation of professional educators (Long, 2020). Those able to hold on to their jobs by working remotely had to find ways to juggle their professional responsibilities, the regular duties of parenting, and their children's education. Those laid off from their jobs had the stress of dealing with financial hardship, job hunting, and an uncertain future. This is not to mention the many households affected by the virus itself, who were forced into collective quarantine or flung into mourning for a victim of the pandemic.

The most commonly cited reason parents opt to homeschool their children is a concern about the school environment.

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Although the situation was difficult for most working parents, those of comfortable means generally had the educational background, the resources, and physical space to provide proper supervision for their children and cope with homeschooling for an extended time. Those without these luxuries were often at a loss: How could they teach a subject of which they had no knowledge? How could they find a quiet place for their children to study in a crowded inner-city apartment shared by extended family? How could they maintain discipline at home and ensure that each child got equal time to do their work on a shared device? How did one deal with disruptions by other family members, emotionally unstable neighbors, noise in the corridors, and so on? Homeschooling,

even on a part-time basis, was not a viable option for households struggling with these problems.

Parents who were called on to homeschool students with disabilities were especially hard-hit as teachers were not required to provide them with Individualized Educational Plans (IEPs) once schools shut their doors. Even when they did, many parents lacked the proper training or time to provide or keep up with the special needs of their children, whose conditions were in danger of rapid regression if their carefully structured schedules unraveled (Chiavaroli, 2020). In other cases, it was the parent who suffered from a disability or debilitating illness, and who now faced the challenge of supplementing their child's (or children's) education all day long for weeks on end (Panico & Duhart, 2020). The frustration, even exasperation, voiced by parents throughout the pandemic bore witness to the fact that homeschooling, however successful for a small minority, is not an effective alternative for the population at large.

It is much harder to ascertain whether homeschooled children fare better on outcomes such as standardized test scores or success in college because few data are available on these topics. Most studies concluding that homeschoolers outperform traditional students are criticized on the grounds that they are focused on biased samples (e.g., Oplinger & Willard, 2004; Rudner, 1999). Experts also argue that it is hard to describe definitively the experience of homeschoolers because they are such a diverse group, representing every possible religious, political, and spiritual orientation (Murphy, 2012).

# Who Benefits From "International Education"?

How many international students are enrolled in your sociology course? How many international students attend your university? In 1943, approximately 8,000 foreign students were enrolled in American colleges and universities. In the 2015–2016 academic year, the number of international students surpassed 1 million for the first time, representing 5 percent of the total student population at U.S. colleges and universities (Institute of International Education [IIE], 2016). Most foreign students today come from Asia; China, India, South Korea, Vietnam, Taiwan, and Japan all send sizeable contingents of students abroad. However, in

2015–2016, Saudi Arabia became the third-largest sender of international students to the United States (after China and India). The United States takes in more foreign students than any other country: New York University and the University of Southern California are the top two destinations. What do foreign students in the United States study? About half in 2018–2019 pursued STEM fields. More than one-fifth study engineering, 16.6 percent study business and management, 18.5 percent concentrate on math and computer sciences, and 7.6 percent study the social sciences (IIE, 2022b).

Some scholars regard the exchange of international students as a vital component of globalization. Foreign students, in addition to serving as global "carriers" of specialized technical and scientific knowledge, play an important cultural role in the globalizing process. Cross-national understandings are enhanced, and xenophobic and isolationist attitudes are minimized, as native students in host countries develop social ties to their foreign classmates and as foreign students return to their countries of origin with an appreciation for the cultural mores of the nation in which they have studied.

Chinese students explore their options at the China International Exhibition Tour college fair. In the 2018–2019 academic year, China accounted for 34 percent of all international students in the United States (IIE, 2022a).

Yet there is considerable debate in the United States about what is sometimes called the "internationalization of education." On most college and university campuses, it is not hard to find disgruntled students who complain that the influx of foreign students deprives deserving Americans of educational opportunities—especially given the increasingly competitive nature of the U.S. higher education system. Moreover, although more than two-thirds of foreign students receive nothing in the way of scholarships, some top-notch foreign students *are* given financial inducements to attend American schools. The outcry against this practice has been loudest at public universities, which receive support from tax revenues. Critics charge that U.S. taxpayers should not shoulder the financial burden of educating foreign students whose families have not paid U.S. taxes and who are likely to return home after earning their degrees.

Supporters of international education find such arguments unconvincing. Some Americans may lose out to foreign students in the competition for slots at prestigious universities, but this is a small price to pay for the economic, political, and cultural benefits the United States receives from having educated millions of foreign business executives, policy makers, scientists, and professionals over the years—many of whom became sympathetically disposed to the United States as a result of their experiences here. And although some foreign students receive scholarships from American universities, most are supported by their parents. In fact, foreign students pump billions of dollars each year into the U.S. economy—in 2021–2022, they spent more than $33.8 billion, including tuition, housing, and related purchases (NAFSA, 2022). Rather than curtail the number of foreign students admitted to American universities, supporters of international education suggest that even more should be done to encourage the exchange of students.

On the one hand, greater effort should be made to recruit foreign students, help them select the university and program that will best meet their needs, and provide them with a positive social and educational experience while they are in the United States. On the other hand, more Americans should be encouraged to study abroad. American students are notorious for having poor or no foreign-language skills and for knowing little about global geography, much less about the cultures of other nations. This cultural and linguistic ignorance puts the United States at a disadvantage relative to other countries as the world becomes

increasingly globalized; encouraging Americans to study overseas may be the best way to inculcate a global worldview.

Should there be a greater focus on international education in American colleges and universities? Should the international exchange of students be expanded? These are among the issues that educational institutions are forced to confront in the context of globalization. Still, more and more U.S. students are studying abroad—more than 948,519 U.S. students studied abroad for credit during the 2021–2022 academic year. While this figure represents an increase of nearly 4 percent over the year before, still only about 10 percent of college students study abroad (NAFSA, 2022). Of those who do study abroad, more than half (53 percent as of 2017–2018) study in Europe, with about one-third studying in the United Kingdom, Italy, or Spain (IIE, 2016). There is a gender gap in who studies abroad, with women accounting for two-thirds of American students studying abroad. Most scholars agree that in our increasingly global society, international education is essential to having a well-informed, open-minded, and forward-looking population.

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## CONCEPT CHECKS

1. **Explain the relationship between race and intelligence. Do you find the evidence compelling?**
2. **What are three reasons parents decide to homeschool their children?**
3. **Describe several characteristics of the “typical” international student enrolled at a U.S. college or university.**

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# THE BIG PICTURE

# Chapter 16

## Education

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**Exercises:** Thinking Sociologically

1. From your reading of this chapter and your own educational experiences, describe what might be the principal advantages and disadvantages of having children go to private versus public schools in the United States at this time. Assess whether privatization of our public schools would help improve them.
2. Back in 1964, Marshall McLuhan argued that radio and television helped produce a global village—that is, a world linked by instantaneous media coverage of worldwide events and news. Explain how the advent of the Internet and cell phones is extending the concept of the global village even further and faster.

# BASIC CONCEPTS p. 637

## Learning Objectives

Learn sociologists' explanations for achievement gaps among different groups of students.

### Terms to Know

achievement gap • intelligence • emotional intelligence • IQ (intelligence quotient)

### Concept Checks

1. Why have many higher education institutions dropped their SAT requirements?
2. What is the “achievement gap”?
3. Define and contrast different types of intelligence.

## SOCIOLOGICAL THEORIES OF EDUCATION p. 640

### Learning Objectives

Understand the social functions of schooling. Learn three major sociological perspectives on the role of schooling in society.

### Terms to Know

hidden curriculum • cultural capital

### Concept Checks

1. Contrast credentialism and social-reproduction perspectives on education.
2. How does the hidden curriculum serve to perpetuate social and economic inequalities?
3. What did Pierre Bourdieu mean by “cultural capital”?

## RESEARCH ON EDUCATION TODAY p. 645

## Learning Objectives

Become familiar with the most important research on whether education reduces or perpetuates inequality. Learn the social and cultural influences on educational achievement.

## Terms to Know

tracking • "acting White" thesis • abstract and concrete attitudes • cultural navigators • gender gap • stereotype threat • stereotype promise • functional literacy • standardized testing • information poverty • cyberspace

## Concept Checks

1. How do Coleman's findings differ from the results of Kozol's research? Whose theory, in your opinion, can better explain race and class gaps in educational achievement?
2. What effect does tracking have on academic achievement?
3. Explain two theories that sociologists have developed to account for the ways that cultural and psychological factors affect educational outcomes.
4. What were the goals of No Child Left Behind and Race to the Top? What were criticisms of these policies?
5. What are some of the reasons there are high rates of illiteracy in developing nations?

# UNANSWERED QUESTIONS p. 663

## Learning Objectives

Learn about some of the current educational issues that concern sociologists, including the debate over the sources of IQ, the merits of homeschooling, and the benefits of international education.

## Concept Checks

1. Explain the relationship between race and intelligence. Do you find the evidence compelling?
2. What are three reasons parents decide to homeschool their children?
3. Describe several characteristics of the “typical” international student enrolled at a U.S. college or university.

# Glossary

achievement gap
: Disparity on a number of educational measures between the performance of groups of students, especially groups defined by gender, race, ethnicity, and socioeconomic status.

intelligence
: Level of intellectual ability, particularly as measured by IQ (intelligence quotient) tests.

emotional intelligence
: The ability to identify, assess, and control the emotions of oneself or others.

IQ (intelligence quotient)
: A score attained on tests of symbolic or reasoning abilities.

hidden curriculum
: Traits of behavior or attitudes that are learned at school but not included in the formal curriculum—for example, gender differences.

cultural capital
: The accumulated cultural knowledge within a society that confers power and status.

tracking
: Dividing students into groups that receive different instruction on the basis of assumed similarities in ability or attainment.

“acting White” thesis
: The thesis that Black students do not aspire or strive to get good grades because it is perceived as “acting White.”

abstract and concrete attitudes
: Abstract attitudes are ideas that are consistent with mainstream societal views, while concrete attitudes are ideas that are based on actual experience.

cultural navigators
: People who draw from both their home culture and mainstream culture to create an attitude that allows them to succeed.

gender gap

The differences between women and men, especially as reflected in social, political, intellectual, cultural, or economic attainments or attitudes.

stereotype threat

The idea that when African American students believe they are being judged not as individuals but as members of a negatively stereotyped social group, they will do worse on tests.

stereotype promise

A phenomenon where being viewed through the lens of a positive stereotype may lead one to perform in such a way that confirms the positive stereotype, thereby enhancing performance.

functional literacy

Reading and writing skills that are beyond a basic level and are sufficient to manage one’s everyday activities and employment tasks.

standardized testing

A system in which all students take the same test under the same conditions.

information poverty

The state of people who have little or no access to information technology, such as computers.

cyberspace

Electronic networks of interaction between individuals at different computer terminals.

# 17 Religion in Modern Society

Can you rank the following list of some of the world's major religions from fastest growing to slowest growing?

1. **Christianity**
2. **Islam**
3. **Judaism**
4. **Hinduism**
5. **Buddhism**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

## LEARNING OBJECTIVES

1. **Basic Concepts** Understand how sociologists define and study religion. Learn about the different types of religious organizations: churches and sects, denominations, and cults.
2. **Sociological Theories of Religion** Understand the sociological approaches to religion developed by Marx, Durkheim, and Weber; the contemporary debate over secularization; and the religious economy approach.
3. **The Sociology of Religion: Current Research** Understand current trends in global religious affiliation and religious affiliation in the United States. Explore the interrelations of gender and religion, as well as the global rise of religious nationalism.
4. **Unanswered Questions** Learn about the sociological debates surrounding trends such as fundamentalism, secularization, and religious violence.

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This is a difficult question, and if you failed to answer it correctly, you are in good company. Very few Americans would get this question right. The correct order is Islam, Christianity, Hinduism, Judaism, and Buddhism. Islam is the world's second-largest religion, with nearly 2 billion adherents—nearly a quarter of the global population; from 2015 to 2060, the Muslim population is projected to grow by a whopping 70 percent—more than twice as fast as the global population—due primarily to the religion's young population and high fertility rate. In contrast, Christianity, currently the world's largest religion with some 2.5 billion adherents, is projected to rise by 34 percent by 2060. This means that Muslims will likely outnumber Christians in the second half of this century (Central Intelligence Agency, 2023b; Pew Research Center, 2017).

While Hinduism and Judaism are both projected to increase in number of adherents, they are growing more slowly than the global population itself, so they will actually account for smaller percentages of the global population in 2060 than they did in 2015. The third-largest religious group in 2023, Hinduism has nearly 1.2 billion adherents and is projected to grow 27 percent by 2060. Judaism, with 16 million adherents, is projected to grow by only 15 percent by 2060. Lastly, Buddhism, which currently has nearly 530 million adherents, is projected to decline by 7

percent by 2060 due to an aging population and low fertility rates (Central Intelligence Agency, 2023b; Pew Research Center, 2017).

Christianity, Islam, and Judaism are all most likely familiar to you—they are called the “Abrahamic faiths” because they all trace their origins to Abraham and all accept the Old Testament of the Bible as an authoritative religious source (although Christianity, unlike Judaism, is founded on the New Testament of the Bible as well, and Islam looks to the Qur’an as authoritative). Hinduism is less likely to be familiar, although yoga and meditation—practices associated with Hinduism and popularized in the United States—may provide at least superficial familiarity with the 4,000-year-old religion that originated in ancient India. The same can be said of Buddhism, a religion that also comes from India and includes contemplative practices such as meditation.

Toward the end of the nineteenth century, the German philosopher Friedrich Nietzsche announced, “God is dead.” Religions, he argued, used to be a point of reference for our sense of purpose and meaning. Henceforth, we would have to live without this security. Living in a world without God would mean creating our own values and getting used to what Nietzsche called “the loneliness of being”—understanding that our lives are without purpose and that no superior entities watch over our fate. Nietzsche believed that with the rise of science and technology, secularization—the movement of a society away from religious beliefs and institutions—would triumph.

Nietzsche was clearly wrong in his prediction. Religion is one of the most truly global of all social institutions, affecting many aspects of life. Throughout the world today, there is a religious revival. While religious revival is not limited to any particular socioeconomic group, it has especially taken root among those who are the most dispossessed. While globalization has brought benefits to many, it has brought hardship to many as well. Grinding poverty, in combination with the erosion of long-standing cultural values and traditions, is fertile ground for religious revival—especially among young people, who compose a large part of the population in countries in the Global South. One major study of secularization and religious revival in nearly 200 societies around the world concluded that religious revival is likely to win out over secularization among people who lack what the authors term “existential security”—“the feeling that survival is secure enough that it can be taken for granted” (Norris & Inglehart, 2004).

Why is it important to have better knowledge of the world's religions? One reason is that it provides a better understanding of the global social changes of recent decades, in which religion has played a central role. For instance, in Vietnam in the 1960s, Buddhist priests burned themselves alive to protest the policies of the South Vietnamese government, contributing to the emergence of an antiwar movement in the United States, where the self-immolations were viewed on television. Today, Buddhist monks living in exile in India have set themselves on fire to protest Chinese rule over Tibet, while Buddhist monks in Thailand are protesting deforestation and inadequate care for AIDS victims.

During the latter part of the twentieth century, an activist form of Catholicism, liberation theology, combined Catholic beliefs with a passion for social justice for the poor, particularly in Central and South America and in Africa. Catholic priests and nuns organized farming cooperatives, built health clinics and schools, and challenged government policies that impoverished the peasantry; many paid with their lives for their activism, which government and military leaders often regard as subversive. Islamic socialists in Pakistan and Buddhist socialists in Sri Lanka have played a similar role (Berryman, 1987; Juergensmeyer, 1993; Sigmund, 1990). In some Central and Eastern European countries once dominated by the former Soviet Union, long-suppressed religious organizations helped overturn socialist regimes during the early 1990s. In Poland, for example, the Catholic Church was allied with the Solidarity movement, which toppled the socialist government in 1989. Churches and religious leaders played a key role in the abolition of slavery in the United States in the nineteenth century and the civil rights movement in the twentieth century.

Religion has also been central in reviving ancient ethnic and tribal hatreds. In Bosnia and elsewhere in the former Yugoslavia, for example, religious differences helped justify "ethnic cleansing," with Christian Serbs and Croats engaging in the mass murder, rape, and deportation of Muslims from communities and farmlands where the Muslims had lived for centuries. When religious beliefs align with strong national feelings, violence can result. And as we shall see, religious violence is not limited to any particular religion. While all major religions profess love and compassion, all have also given rise to offshoots that justify the use of violence (Juergensmeyer, 2001, 2008). Another reason it is important to

better understand the world’s religions is that ignorance can fuel suspicion, prejudice, and hatred.

Anti-Islamic protesters gather outside an event for Texas Muslim Capitol Day. A 2014 survey found that Americans view Islam more negatively than any other major religion.

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On August 5, 2012, Wade Michael Page, a 40-year-old guitarist associated with hate-rock bands, walked into a Sikh temple in Oak Creek, Wisconsin, and opened fire on the worshippers. Before police respondents arrived and shot him, he had killed six people and wounded others. Page’s reasons for shooting innocent worshippers may never be fully known; he died at the scene. But it is known that he was a White supremacist who hated Muslims and had reportedly called for massive bombing of the Middle East after September 11, 2001 (Goffard & Hennessy-Fiske, 2012). It seems likely that Page went on his shooting rampage intending to kill Muslims, not realizing that Sikhism is unrelated to Islam. Sikhism, a relatively new religious tradition some 500 years old, is unlikely to be familiar to most Americans, even though an estimated quarter million Sikhs live in the United States. To Page’s bigoted eye, the turbaned Sikh men, with their long black beards, were likely indistinguishable from Muslims.

If Page indeed had been venting his anger against people he believed to be Muslims, he was not alone in harboring negative stereotypes. A nationwide survey in 2023 found that Americans viewed Islam more negatively than they viewed Jews, mainline Protestants, and Catholics (Tevington, 2023). A decade ago, a similar survey had found that only 57 percent of Americans had a favorable opinion of Muslims, compared with 89 percent for Christians and 82 percent for Jews. Among those polled, roughly half believed that some religions are more prone to violence than others; fully 70 percent of those with such beliefs also claimed that Islam is the most violent religion, compared with 9 percent for Christianity and 2 percent for Judaism. In fact, nearly half (45 percent) of all Americans polled stereotyped Islam as violent, with 7 out of 10 reporting being concerned about Muslim extremism in the United States (Pew Research Center, 2011d).

Religion plays a key role in the world today. Religious groups were a major force in the Arab Spring that began with the self-immolation of Mohamed Bouazizi, a poor Tunisian street vendor who set himself on fire to protest harassment by corrupt local officials who had made it impossible for him to eke out a living selling produce from a cart. Bouazizi’s sacrifice, seen around the world on YouTube and other social media, sparked revolutions in the Middle East and North Africa that overturned dictatorships in Egypt, Libya, and Yemen and ignited a civil war in Syria.

The popular 2011 uprising in Cairo’s Tahrir Square toppled then-president Hosni Mubarak, a military leader who had run the country for 30 years. Egypt held its first free elections the following year, and the Muslim Brotherhood’s candidate, Mohamed Morsi, was elected president with 52 percent of the popular vote. A large and influential religious organization throughout the Arab world, the Muslim Brotherhood had been kept mainly underground until then. Morsi came to be seen by many Egyptians, including the still-powerful military, as moving to consolidate power and shift Egypt in a strong Islamist direction. In 2013, he was arrested by the military, which launched a brutal crackdown against the Muslim Brotherhood and its perceived supporters. Tens of thousands were arrested as terrorists, and hundreds were sentenced to death. Abdel Fattah el-Sisi, the general who led the military coup, was elected president in 2014.

The Arab Spring proved to be equally fleeting elsewhere in the Middle East. Syria, Yemen, and Libya were ravaged by internal strife and civil wars that had, at least in part, a religious dimension. Conflicts spilled over into Jordan and Lebanon, as well as parts of North Africa. With the exception of Egypt, where it was repressed, there was a resurgence of Islamic fundamentalism throughout the region. The only country to remain democratic, among all the countries that had participated in the Arab Spring, was Tunisia—the country where it began. We will return to the role of religion in the Middle East later in this chapter.

# Glossary

secularization
: A process of decline in the influence of religion. Although modern societies have become increasingly secularized, tracing the extent of secularization is a complex matter. Secularization can refer to levels of involvement with religious organizations (such as rates of church attendance), the social and material influence wielded by religious organizations, and the degree to which people hold religious beliefs.

liberation theology
: An activist Catholic religious movement that combines Catholic beliefs with a passion for social justice for the poor.

# 1 BASIC CONCEPTS

**Understand how sociologists define and study religion. Learn about the different types of religious organizations: churches and sects, denominations, and cults.**

Religion is one of the oldest human institutions. According to anthropologists, there have probably been about 100,000 religions throughout human history (Hadden, 1997a). When sociologists study religion, they hope to better understand its historical and contemporary role in shaping society and, conversely, the historical and contemporary social forces that shape religion itself (Hamilton, 2001).

Sociologists define religion as a cultural system of commonly shared beliefs and rituals that provides a sense of ultimate meaning and purpose by creating an idea of reality that is sacred, all-encompassing, and supernatural (Berger, 1967; Durkheim, 1912/1965; Wuthnow, 1988). There are three key elements in this definition:

1. Religion is a form of culture, which consists of the shared beliefs, values, norms, and material conditions that create a common identity among a group of people. Religion has all these characteristics.
2. Religion involves beliefs that take the form of ritualized practices—special activities in which believers take part and that identify them as members of the religious community.
3. Religion provides a feeling that life is ultimately meaningful. It does so by explaining coherently and compellingly what transcends or overshadows everyday life, in ways that other aspects of culture (such as an educational system or a belief in democracy) cannot (Geertz, 1973; Wuthnow, 1988).

What is absent from the sociological definition of religion is just as important as what is included: Nowhere is there mention of a god. We often think of theism—a belief in one or more supernatural deities—as basic to religion, but this is not necessarily the case. As we shall see, some religions, such as Buddhism, believe in spiritual forces rather than a singular god.

# How Sociologists Think About Religion

When sociologists study religion, they do so as unbiased scientists and not as believers (or disbelievers) in any particular faith. This stance has a number of implications:

- **Sociologists are not concerned with whether religious beliefs are true or false.** The sociological perspective regards religions as socially constructed by human beings. Thus, sociologists put aside their personal beliefs and address the human, rather than the divine, aspects of religion. Sociologists ask: How is the religion organized? What are its principal beliefs and values? How is it related to the larger society? What explains its success or failure in recruiting and retaining believers? The question of whether a particular belief is "good" or "true" is not something that sociologists can address. (As individuals, they may have strong opinions on the matter, but as sociologists, they must keep these opinions from biasing their research.)
- **Sociologists are especially concerned with the social organization of religion.** Not only are religions a primary source of the deepest-seated norms and values, but they are practiced through an enormous variety of social forms. Within Christianity and Judaism, for example, religious practice often occurs in formal organizations, such as churches or synagogues. Yet within Hinduism and Buddhism, religious practices occur in the home as well as in temples or other natural settings. The sociology of religion considers how different religious institutions and organizations actually function. The earliest European religions were often indistinguishable from the larger society since beliefs and practices were incorporated into daily life. In modern industrial society, however, some religions have become established in separate, often bureaucratic, organizations (Hammond, 1992). This institutionalization has led some sociologists to view religions in the United States and Europe as similar to business organizations, competing with one another for members (Warner, 1993).
- **Sociologists have often viewed religions as a major source of social solidarity in that they offer believers a common set of norms and values.** Religious beliefs, rituals, and bonds create a "moral community" in which all members know how to behave

(Wuthnow, 1988). If a single religion dominates a society, the religion may be an important source of social solidarity—although it may also be oppressive if, like the Taliban, it requires absolute conformity to a particular set of beliefs and punishes those who deviate.

- **If a society's members adhere to competing religions, religious differences may lead to destabilizing social conflicts.** Recent examples of religious conflict within a society include struggles among Sikhs, Hindus, and Muslims in India; clashes between Muslims and Christians in Bosnia and other parts of the former Yugoslavia; conflicts between Shiite and Sunni Muslims in Iraq; and hate crimes against Jews, Muslims, and other religious minorities in the United States.
- **Sociologists explain the appeal of religion in terms of social forces rather than personal, spiritual, or psychological factors.** Sociologists do not question the depth of believers' transcendent feelings and experiences, yet they also do not limit themselves to a purely spiritual explanation of religious commitment. In fact, some researchers argue that people often turn to, or "get," religion when their fundamental sense of social order is threatened by economic hardship, loneliness, loss or grief, physical suffering, or poor health (Berger, 1967; Glock, 1976; Schwartz, 1970; Stark & Bainbridge, 1980). In explaining the appeal of religious movements, sociologists are more likely to focus on problems in the social order than on the individual's psychological response.

# What Do Sociologists of Religion Study?

Several types of social forces are of special interest to sociologists of religion. First, sociologists study the ways in which a crisis in prevailing beliefs promotes religious fervor. Such a crisis occurred in the United States during the 1960s as a result of the civil rights movement, opposition to the Vietnam War, social movements among racial and ethnic minorities, and the youth-oriented counterculture. Large numbers of people were attracted to religious teachers, ranging from Indian gurus to fundamentalist preachers, who offered everything from meditation and yoga to astrology and New Age religions (Wuthnow, 1988, 1998).

There is currently a resurgence of religious fervor throughout the world among Christians, Muslims, and Jews; while the reasons for this resurgence are not fully understood, part of the explanation involves the global changes sweeping the world today (Juergensmeyer, 2008). These include the failure of nonreligious institutions, particularly governments, to promote political and economic security in many parts of the world; the global spread of cultural norms and values and their perceived threat to traditional beliefs and values; and the explosion of new forms of media, especially the internet, which has made it easier for religiously like-minded people to share their beliefs and build their religious institutions.

Second, sociologists study how competition among religious organizations leads some to thrive and others to perish. This study has sparked an increased interest in the organizational dynamics of religious groups (Finke & Stark, 1988, 2005; Hammond, 1992; Roof & McKinney, 1990; Stark & Bainbridge, 1987).

Third, sociologists address the relationship among religion, ethnic identity, and politics. This interconnection is seen in the resurgence of ethnically based religion in pluralist societies such as the United States and in the rise of religious nationalism worldwide (Juergensmeyer, 1993, 2008; Lawrence, 1989; Merkyl & Smart, 1983; Sahliyeh, 1990; see later discussion of religious nationalism).

Although the sociology of religion has long included non-European religions, there has been a tendency to view all religions through concepts based in the European experience. For example, notions such as *denomination*, *sect*, and *cult* (defined in the next section) presuppose formally organized religious institutions; they are of questionable utility in studying religions that emphasize spiritual practice as a part of daily life or that pursue the complete integration of religion with civic and political life. Recently, there has been an effort to create a comparative sociology of religion that examines religious traditions from within their own frames of reference (Juergensmeyer, 1993; Smart, 1989; van der Veer, 1994; Wilson, 1982).

# Types of Religious Organizations

Early theorists such as Max Weber (1922/1963), Ernst Troeltsch (1931), and H. Richard Niebuhr (1929) described religious organizations according to the degree to which they were well established and conventional: In their view, churches are conventional and well established, cults are neither, and sects fall somewhere in the middle. These distinctions were based on a study of European and U.S. religions. There is much debate over how well they apply to the non-Christian world.

## Churches and Sects

Churches are large, established religious bodies; one example is the Roman Catholic Church. They normally have a formal, bureaucratic structure with a hierarchy of officials. Churches often represent the conservative face of religion, because they are integrated within the existing institutional order. Most of their adherents are born into, and grow up within, the church.

A sect is typically described as a religious subgroup that breaks away from the larger organization and consequently follows its own unique set of rules and principles. Sects are smaller, less organized groups of committed believers, usually set up in protest of an established church. Sects aim to discover or follow the "true way" and try to either change the surrounding society or withdraw into communities of their own, a process known as *revival.* The members of sects often regard established churches as corrupt. Many sects have few or no officials, and all members are equal participants. For the most part, people are not born into sects but join them to further personal beliefs.

## Denominations

A denomination is a sect that has become an institutionalized body rather than an activist protest group. Sects that survive over time become denominations. Calvinism, Methodism, and Mormonism were sects during their early period, when they generated great fervor among their members, but over the years they became established denominations. (Calvinists today are called Presbyterians.) Denominations are recognized as legitimate by churches, often cooperating harmoniously with them. Other examples of Christian denominations include Baptists,

Lutherans, and many of the evangelical Christian groups that have gained adherents and become more mainstream during recent decades.

## Cults

Cults resemble sects, but their emphases are different. The most loosely knit and transient of all religious organizations, cults comprise individuals who reject the values of the outside society. They are a form of religious innovation rather than revival. They focus on individual experience, bringing like-minded people together. Cults often form under the influence of an inspirational leader.

Cults are often in a high degree of tension with the larger society. In 1997, 39 members of Heaven's Gate, a cult whose members believed they were destined for a "higher level," took their lives to ascend to a spaceship they believed lurked behind the Hale-Bopp comet. The Japanese cult Aum Shinrikyo ("Om Supreme Truth"), which once claimed as many as 20,000 members, combined elements of Buddhism and Christianity, including Christian predictions about a pending global apocalypse derived from the Book of Revelations and the writings of the sixteenth-century Christian Nostradamus. (Such doomsday predictions are not uncommon in Christian cults as well.) Aum Shinrikyo's members regarded the group's founder and leader, Shoko Asahara, as Christ. In 1995, cult members released the deadly nerve gas sarin on five Tokyo subway trains; 12 people died and thousands were injured, some seriously. Investigations revealed that the cult had previously spread germs at numerous locations in Japan, although without any toxic effects. Many of the cult members were subsequently tried and convicted in Japan for the subway gassing and other crimes; some, including Asahara, were sentenced to death. In 2000, Aum Shinrikyo changed its name to Aleph, reportedly moderated its teachings, and now claims 1,000 or so members (Juergensmeyer, 2008).

Like sects, cults flourish when there is a breakdown in well-established societal belief systems. This breakdown is happening worldwide today, in places as diverse as Japan, India, and the United States. When such a breakdown occurs, cults may either originate within the society itself or be "imported" from outside. In the United States, examples of homegrown, or indigenous, cults include New Age religions based on spiritualism, astrology, and religious practices adapted from Asian or

Native American cultures. Examples of imported cults include the late Reverend Sun Myung Moon's Unification Church (whose members are popularly, if derogatively, known as "Moonies"), which originated in South Korea, and the Transcendental Meditation movement, which was promoted by the Maharishi Mahesh Yogi in India. A cult arising out of the Siddha Yoga tradition was brought to the United States in the 1970s by Swami Muktananda; since his death in 1982, the global spiritual movement—it has centers in nearly three dozen countries—has been led by his female disciple Gurumayi Chidvilasananda.

Members of the Unification Church, founded by Reverend Sun Myung Moon, participate in a mass wedding. The Holy Marriage Blessing Ceremony strengthens participants' dedication to the church.

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A cult in one country may be an established religious practice in another. When Indian gurus practice in the United States, what might be considered an established religion in India is regarded as a cult in the United States. Christianity began as an indigenous cult in ancient Jerusalem, and in many Asian countries today evangelical Protestantism is regarded as a cult imported from the United States. A leading sociologist of religion, Jeffrey K. Hadden (1997a), points out that all the approximately 100,000 religions that humans have devised were once new; most were initially despised cults from the standpoint of respectable religious belief of the times. For example, Jesus was crucified because his

ideas threatened the established order of the Roman-dominated religious establishment of ancient Judaea.

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**CONCEPT CHECKS**

1. **What are the three main components of religion as a social institution?**
2. **How do sociologists differ from other scholars in their approach to studying religion?**
3. **Describe four types of religious organizations.**

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# Glossary

religion
: A set of beliefs adhered to by the members of a community, incorporating symbols regarded with a sense of awe or wonder together with ritual practices. Religions do not universally involve a belief in supernatural entities.

theism
: A belief in one or more supernatural deities.

churches
: Large bodies of people belonging to an established religious organization. The term is also used to refer to the place in which religious ceremonies are carried out.

sects
: Religious movements that break away from orthodoxy.

denomination
: A religious sect that has lost its revivalist dynamism and become an institutionalized body, commanding the adherence of significant numbers of people.

cults
: Fragmentary religious groupings to which individuals are loosely affiliated but that lack any permanent structure.

# 2 SOCIOLOGICAL THEORIES OF RELIGION

**Understand the sociological approaches to religion developed by Marx, Durkheim, and Weber; the contemporary debate over secularization; and the religious economy approach.**

Sociological approaches to religion are strongly influenced by the ideas of Karl Marx, Émile Durkheim, and Max Weber. None of the three theorists was religious himself, and each argued that religion was fundamentally an illusion: The very diversity of religions and their obvious connection to different societies and regions made their advocates' claims inherently implausible, according to these early theorists.

## The Classical View

Marx, Weber, and Durkheim all wrote about religion but drew radically different conclusions. For Marx, religion was a form of false consciousness, blinding people to the underlying causes of inequality. Durkheim viewed religion as an important source of social solidarity, while Weber analyzed the relationship between religion and the emergence of capitalism.

### Marx: Religion and Inequality

Karl Marx never studied religion in any detail. His thinking on religion was derived mostly from the writings of Ludwig Feuerbach, who believed that through a process he called alienation, human beings attribute their own culturally created values and norms to alien, or separate, beings (i.e., divine forces or gods) because they do not understand their own history. Thus, the story of the Ten Commandments given to Moses by God is a mythical version of the origins of moral precepts that govern the lives of Jewish and Christian believers.

Marx accepted Feuerbach's view that religion represents human self-alienation. In a famous phrase, he declared that religion was the "opium of the people":

> Religion is the sigh of the oppressed creature, the heart of a heartless world, just as it is the spirit of a spiritless situation. It is the opium of the people. The abolition of religion as the illusory happiness of the people is required for their real happiness. (Marx, 1843–1844/1994)

Religion defers happiness and rewards to the afterlife, Marx argued, teaching a resigned acceptance of conditions in the earthly life—including inequalities and injustices. Religion contains a strong ideological element: Religious belief can provide justifications for those in power. For example, "The meek shall inherit the earth" suggests humility and nonresistance to oppression. In Marx's view, people had to shed their religious beliefs to better understand the social forces that were oppressing them. Only then, he argued, would people rise up, overthrow the oppressive order, and create a society that truly served their interests.

## Durkheim: Religion and Functionalism

In contrast to Marx, Émile Durkheim extensively studied religion and connected religion not with social inequalities or power but with the overall nature of a society's institutions. In *The Elementary Forms of the Religious Life* (1912/1965), Durkheim concentrated on *totemism*, the worship of objects such as animals or plants believed to embody mystical spirits. Durkheim studied totemism as practiced by Australian Aboriginal societies, arguing that such totemism represented religion in its most "elementary" form.

Durkheim defined religion in terms of a distinction between the sacred and the profane. Sacred objects and symbols, he held, are treated as apart from routine aspects of day-to-day existence—the realm of the profane. A totem (an animal or plant believed to have symbolic significance), Durkheim argued, is a sacred object, regarded with veneration and surrounded by ritual activities. These ceremonies and rituals, in Durkheim's view, are essential to unifying the members of groups.

Durkheim's theory of religion is a good example of the functionalist tradition. To analyze the function of a social behavior or social institution

such as religion is to study its contribution to the continuation of a group, community, or society. According to Durkheim, religion promotes a stable society by ensuring that people meet regularly to affirm common beliefs and values.

## Weber: World Religions and Social Change

Whereas Durkheim based his arguments on a restricted range of examples, Max Weber conducted a massive study of religions worldwide. No scholar before or since has undertaken a task of the scope Weber attempted. His writings on religion differ from those of Durkheim because they concentrate on the connection between religion and social change, and they contrast with those of Marx because Weber argued that religion was not necessarily a conservative force; on the contrary, religiously inspired movements have often produced dramatic social transformations. Thus, Protestantism, particularly Puritanism, according to Weber, was the source of the capitalist outlook found in the modern West. The early entrepreneurs were mostly Calvinists. Their drive to succeed, which helped initiate Western economic development, was originally prompted by a desire to serve God. Material success was considered a sign of divine favor. But because Calvinists also believed that one should not ostentatiously flaunt one’s wealth, Calvinist entrepreneurs were likely to re-invest their wealth in their enterprises, rather than spend it on personal consumption. Such “worldly asceticism,” as Weber called it, resulted in capital accumulation—the hallmark of a successful capitalist system.

Weber’s discussion of the effect of Protestantism on the development of the West was connected to a comprehensive attempt to understand the influence of religion on social and economic life in various cultures. After analyzing the Eastern religions, Weber concluded that they prevented the widespread development of industrial capitalism because they were oriented toward different values, such as escape from the toils of the material world. In traditional India and China, Weber held, periodic development of commerce, manufacturing, and urbanism did not generate the radical patterns of social change that led to industrial capitalism in the West. In his view, Indian and Chinese belief systems significantly inhibited such change. Hinduism in India, he argued, sees material reality as a veil hiding the true spiritual concerns to which

humankind should be oriented; one should focus on spiritual development rather than the material world.

Max Weber categorized Eastern religions as “otherworldly” and Christianity as a “salvation religion.” Weber believed that Hinduism stressed escaping material existence to a higher plane of being, which cultivated an attitude of passivity. In contrast, he argued that Christianity and its emphasis on salvation could stimulate revolt against the existing order.

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In China, according to Weber, Confucianism also directs activity away from economic “progress” because it emphasizes harmony with the world rather than promoting an active mastery of it. Although China was long the most powerful and most culturally developed civilization in the world, its dominant religious values acted as a brake on a stronger commitment to economic development. It is interesting to note that a century later, sociologists have attributed the current economic growth of China and other East Asian countries, at least in part, to the same set of beliefs that Weber saw as a deterrent, drawing parallels between certain aspects of Confucianism and the Protestant ethic (Wei-ming, 1989; Berger, 1988).

Weber regarded Christianity as a *salvation religion*—one in which human beings can be “saved” if they accept the beliefs of the religion and follow

its moral tenets. The notions of sin and of being rescued from sinfulness by God's grace generate an emotional dynamism absent from the Eastern religions. Whereas Eastern religions cultivate an attitude of passivity or acceptance, Christianity demands a constant struggle against sin and thereby can stimulate revolt against the existing order. Religious leaders —such as Luther or Calvin—have arisen who reinterpret doctrines in such a way as to challenge the existing power structure.

## Critical Assessment of the Classical View

Marx, Durkheim, and Weber each identified some important general characteristics of religions, and, in some ways, their views complement one another. Marx was right to claim that religion often has ideological implications, serving to justify the interests of ruling groups at the expense of others. There are innumerable examples in history. Consider the European missionaries who sought to convert "heathen" peoples to Christian beliefs; their motivations may have been sincere, yet their teachings reinforced the destruction of traditional cultures and the imposition of White domination. Also, almost all Christian denominations tolerated or endorsed slavery in the United States and other parts of the world into the nineteenth century. Doctrines were developed proclaiming slavery to be based on divine law, with disobedient slaves being considered guilty of an offense against God as well as their masters (Stampp, 1956).

But Weber was also correct in stressing the unsettling and often revolutionary effect of religious ideals on the established social order. In spite of the churches' early support for slavery in the United States, church leaders later played a key role in fighting to abolish the institution. Religious beliefs have at times prompted social movements against unjust systems of authority. Religious sentiments were prominent in the civil rights movements of the 1960s, where Black churches played the key role. Dr. Martin Luther King Jr., a Baptist minister, was a cofounder of the Southern Christian Leadership Conference, an organization of Southern Black churches dedicated to ending racial segregation through nonviolent protests (Branch, 1989, 1999, 2007).

The divisive influences of religion find little mention in Durkheim's work, which emphasized the role of religion in promoting social cohesion. Yet it is not difficult to redirect his ideas toward explaining

religious division, conflict, and change, as well as solidarity. After all, much of the strength of feeling generated against other religious groups derives from the commitment to religious values that binds each community of believers. Among the most valuable points of Durkheim's writings is his emphasis on ritual and ceremony. All religions hold regular assemblies of believers, at which ritual prescriptions are observed. As Durkheim rightly points out, ritual activities also mark the major transitions of life—birth, entry to adulthood, marriage, and death (van Gennep, 1908/1977).

Marx, Durkheim, and Weber based their theories of religion on their studies of societies in which a single religion predominated. Consequently, it seemed reasonable to examine the relationship between a predominant religion and the society as a whole. However, since the 1950s, some U.S. sociologists have challenged this classical view. Living in a society that is highly tolerant of religious diversity, contemporary theorists have focused on religious pluralism rather than on religious domination. Not surprisingly, their conclusions differ substantially from the views of Marx, Durkheim, and Weber, each of whom regarded religion as closely bound with the larger society. Religion was believed to reflect and reinforce society's values, or at least the values of those who are most powerful; provide solidarity and social stability; and serve as an engine of social change. According to this view, religion is threatened by secular thinking, particularly as seen in the rise of science, technology, and rational thought.

Secularization, as we have noted previously, involves a decrease in religious belief and involvement, and therefore results in a weakening of the social and political power of religious organizations. Peter Berger (1967) has described religion in premodern societies as a "sacred canopy" that covers all aspects of life and is seldom questioned. In modern society, however, the sacred canopy is more like a quilt, a patchwork of different religious and secular belief systems. When beliefs are compared, it becomes increasingly difficult to sustain the idea that there is any single true faith.

# Contemporary Approaches: Religious Economy

One influential recent approach to the sociology of religion is tailored to societies, such as the United States, that encompass many different faiths. Taking their cue from economic theory, sociologists who favor the religious economy approach argue that religions can be understood as organizations in competition with one another for followers (Finke & Stark, 1988, 2005; Hammond, 1992; Moore, 1994; Roof & McKinney, 1990; Stark & Bainbridge, 1980, 1985, 1987; Warner, 1993). These sociologists argue that competition is preferable to monopoly when it comes to ensuring religious vitality. Whereas the classical theorists Marx, Durkheim, and Weber assumed that religion was weakened when challenged by different religious or secular viewpoints, the advocates of the religious economy perspective argue that competition increases the overall level of religious involvement in society. First, the competition makes each religious group try that much harder to win followers. Second, the presence of numerous religions means there is likely something for everyone. In a culturally diverse society, a single religion will probably appeal to a limited range of followers, whereas the presence of, say, Hindu gurus and fundamentalist preachers, in addition to mainline churches, will likely encourage a high level of religious participation.

Religious economy scholars argue that successful religious groups must have effective representatives spreading their beliefs. For example, the fall of communism in Mongolia brought religious freedom to this sparsely populated country located between China and Russia. It also brought foreigners eager for converts, such as Mormon missionaries.

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This analysis is adapted from the business world, in which competition presumably encourages the emergence of specialized products appealing to specific markets. In fact, religious economists borrow the language of business in describing the conditions that lead to the success or failure of a particular religious organization. According to Roger Finke and Rodney Stark (2005), a successful religious group must be well organized for competition, have eloquent preachers who are effective “sales reps” in spreading the word, offer beliefs and rituals that are packaged as an appealing product, and develop effective marketing techniques. Television evangelists, or televangelists, have been especially good businesspeople in selling religious products. As Finke and Stark (2005)

put it, “The churching of America was accomplished by aggressive churches committed to vivid otherworldliness.” Religious economy scholars thus do not see competition as undermining religious beliefs and contributing to secularization. Rather, they argue that modern religion constantly renews itself through active marketing and recruitment.

Although a large body of research supports the notion that competition is good for religion, not all studies come to this same conclusion (Land et al., 1991). Some have argued that the religious economy approach overestimates the extent to which people rationally choose a religion. According to this view, among deeply committed believers, even in societies where people can choose among religions, most practice their childhood religion without considering alternatives. Wade Clark Roof’s 1993 study of 1,400 baby boomers found that a third remained loyal to their childhood faith, while another third continued to profess their childhood beliefs although they no longer belonged to a religious organization. Thus, only a third were actively seeking a new religion, making the sorts of choices the religious economy approach presumes.

A study by the Pew Research Center (2009), however, found Americans to be more religiously fickle than was previously believed. The study, based on thousands of interviews, concluded, “Americans change religious affiliation early and often.” A more recent 2015 study from Pew found that a third of American adults (34 percent) practice a different religion than the one they were born into, not including switching among different Protestant denominations (Pew Research Center, 2015c). Americans—especially young people—more than ever seem to be a nation of seekers.

# Secularization: The Sociological Debate

The debate over secularization is one of the most complex areas in the sociology of religion. Basically, the disagreement is between supporters of the secularization thesis (who see religion as diminishing in power and importance in the modern world) and opponents (who argue that religion remains a significant force, albeit often in new and unfamiliar forms).

There is little consensus about how to measure secularization or even how to define religion. Some argue that religion is best understood in

terms of the world’s traditional faiths; others seek a much broader view to include dimensions such as personal spirituality and deep commitment to certain values. We can evaluate secularization according to a number of dimensions. Some are objective, such as the level of membership of religious organizations—how many people belong to a church or other religious body and attend services or other ceremonies. With the exception of the United States, the industrialized countries have all experienced considerable secularization according to this index.

The pattern of religious decline seen in Britain is found in most of Western Europe, including predominantly Catholic countries such as France and Italy. More Italians than French attend church regularly and participate in the major rituals (such as Easter Communion), but the overall pattern of declining religious observance is similar in both cases. In France and Germany, less than 10 percent attend weekly religious services; in Belgium, the Netherlands, the United Kingdom, and Luxembourg, 10 to 15 percent are regular churchgoers. Regular attendance is only marginally higher in Spain (21 percent), Portugal (29 percent), and Italy (31 percent) (Manchin, 2004).

The United States is by far the most religious country among the advanced industrialized nations. Indeed, when sociologists Pippa Norris and Ronald Inglehart (2004) examined data from four World Values Surveys conducted over a 20-year period in 80 societies, they concluded that the United States was one of the most religious nations in the world. A recent survey found that 51 percent of Americans say that religion is very important in their lives, compared to 29 percent in Canada, 21 percent in Italy, 22 percent in Spain, 11 percent in Germany, 11 percent in France, and 10 percent in Japan (Brenan, 2018; Evans & Baronavski, 2018; Lipka, 2019; Pew Research Center, 2018).

In the Global South, the story is quite different. In the poorest countries, where people are most vulnerable, religiosity is thriving. This is especially true in parts of the Islamic world, but it can also be seen in the growing strength of Christianity, especially in Africa. In sub-Saharan Africa, the regional average is 89 percent for people who say religion is very important in their lives (Pew Research Center, 2018). A report by the Pew Research Center on the future of world religions estimated that 4 out of every 10 Christians in the world will live in sub-Saharan Africa by 2060 (Pew Research Center, 2017). People who live in the poorest nations are not only more religious than people who live in industrialized

ones; they also have much higher fertility rates, so their population is growing more rapidly. As Norris and Inglehart (2004) succinctly put it, “The world as a whole now has more people with traditional religious views than ever before—and they constitute a growing proportion of the world’s population.”

A second dimension of secularization concerns how far churches and other religious organizations maintain their social influence, wealth, and prestige. In earlier times, religious organizations wielded considerable power over governments and social agencies and commanded high respect in the community. How much is this still the case? By the twenty-first century, religious organizations had lost much of their former social and political influence, particularly in the advanced industrial nations. Church leaders could no longer expect to be as influential with the powerful. Although some established churches remain very wealthy and some new religious movements have rapidly built up fortunes, the material circumstances of many long-standing religious organizations have become insecure. In the United States, however, since the 1970s, there has been a resurgence in the power of churches, particularly from what has come to be known as the Christian Right. We shall discuss this resurgence later in this chapter.

Muslims pray at the Grand Mosque in Senegal. Religion is thriving in the Global South, particularly in countries in sub-Saharan Africa,

which is projected to be home to a growing share of the world's Muslims.

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A third dimension of secularization—the dimension of religiosity—concerns beliefs and values. As in the other dimensions, we need an accurate understanding of the past to see how far religiosity has declined today. Supporters of the secularization thesis argue that in the past, religion was far more important to daily life than it is now. The church was at the heart of local affairs and strongly influenced family and personal life. Yet critics of this thesis argue that just because people attended church more regularly does not prove that they were more religious. As two leading sociologists of religion have noted, most Americans during Colonial times were far from puritanical, even though American schoolchildren are raised on images of pious Pilgrims bowed in prayer over Thanksgiving turkey. According to Finke and Stark (2005), "Boston's taverns were probably fuller on Saturday night than were its churches on Sunday morning." Finke and Stark go on to argue that Americans are in fact more religious today on the whole than they were in Colonial times—largely because there are more religions to choose from, as we shall see in the following section of this chapter.

On balance, it does seem that the hold of religious ideas today is weaker than in the traditional world—particularly if we include the range of the supernatural. Most of us no longer experience our environment as permeated by divine or spiritual entities that need to be worshipped and placated, lest they do us harm. It is certainly true that some of the major tensions in the world today—such as those afflicting the Middle East or the violence perpetrated by ISIS—derive from religious differences. But the majority of conflicts and wars remain secular, concerned with divergent political goals or material interests, although these may coincide with ethnic and religious differences.

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**CONCEPT CHECKS**

1. **Why did Karl Marx call religion "the opium of the people"?**
2. **What are the differences between classical and contemporary approaches to understanding religion?**
3. **Do the statistics on the growth and decline of religions worldwide provide support for the religious economy approach?**

**Why or why not?**

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# Glossary

alienation
: The sense that our own abilities as human beings are taken over by other entities. The term was originally used by Karl Marx to refer to the projection of human powers onto gods. Subsequently, he used the term to refer to the loss of workers' control over the nature and products of their labor.

sacred
: That which inspires attitudes of awe or reverence among believers in a given set of religious ideas.

profane
: That which belongs to the mundane, everyday world.

secular thinking
: Worldly thinking, particularly as seen in the rise of science, technology, and rational thought in general.

religious economy
: A theoretical framework within the sociology of religion that argues that religions can be fruitfully understood as organizations in competition with one another for followers.

# 3 THE SOCIOLOGY OF RELIGION: CURRENT RESEARCH

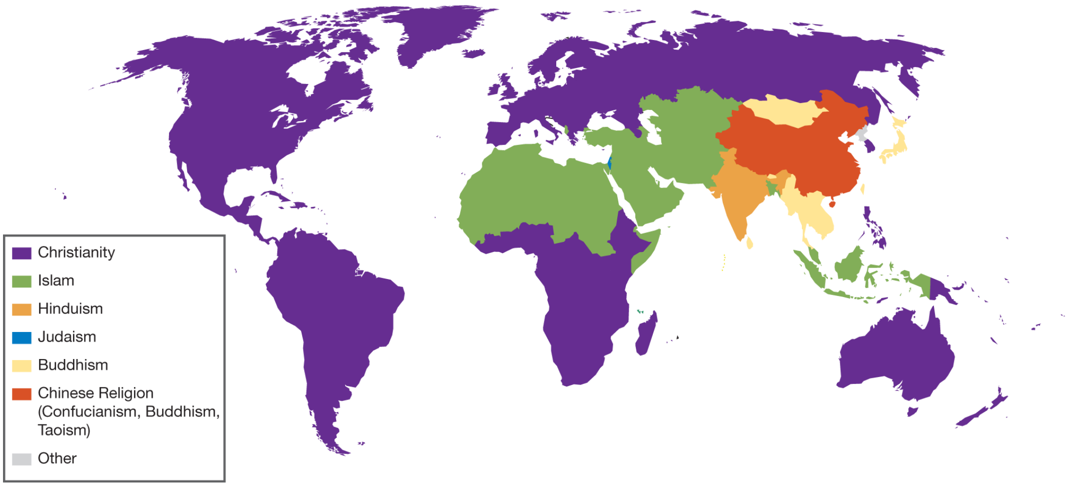
**Understand current trends in global religious affiliation and religious affiliation in the United States. Explore the interrelations of gender and religion, as well as the global rise of religious nationalism.**

If classical theorists believed that religious beliefs were giving way to scientific thought and secularization, today it is clear that a religious revival has been occurring, both globally and in the United States. In our review of current research, we first present a current picture of trends in world religions and religion in the United States, before turning to two topics that are of particular interest to many sociologists of religion: gender and religion, and the global rise of religious nationalism.

Global Map 17.1

**MAJOR RELIGIONS OF THE WORLD**

Missionaries and military force are two reasons the majority of people in the world today profess only a handful of religions. Although Christianity is the most widespread religion, its followers are becoming outnumbered by followers of Islam.



Source: WGBH Educational Foundation, 2015.

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# World Religions

Although there are thousands of religions worldwide, three of them—Christianity, Islam, and Hinduism—are embraced by nearly three-quarters of the people on earth (Global Map 17.1).

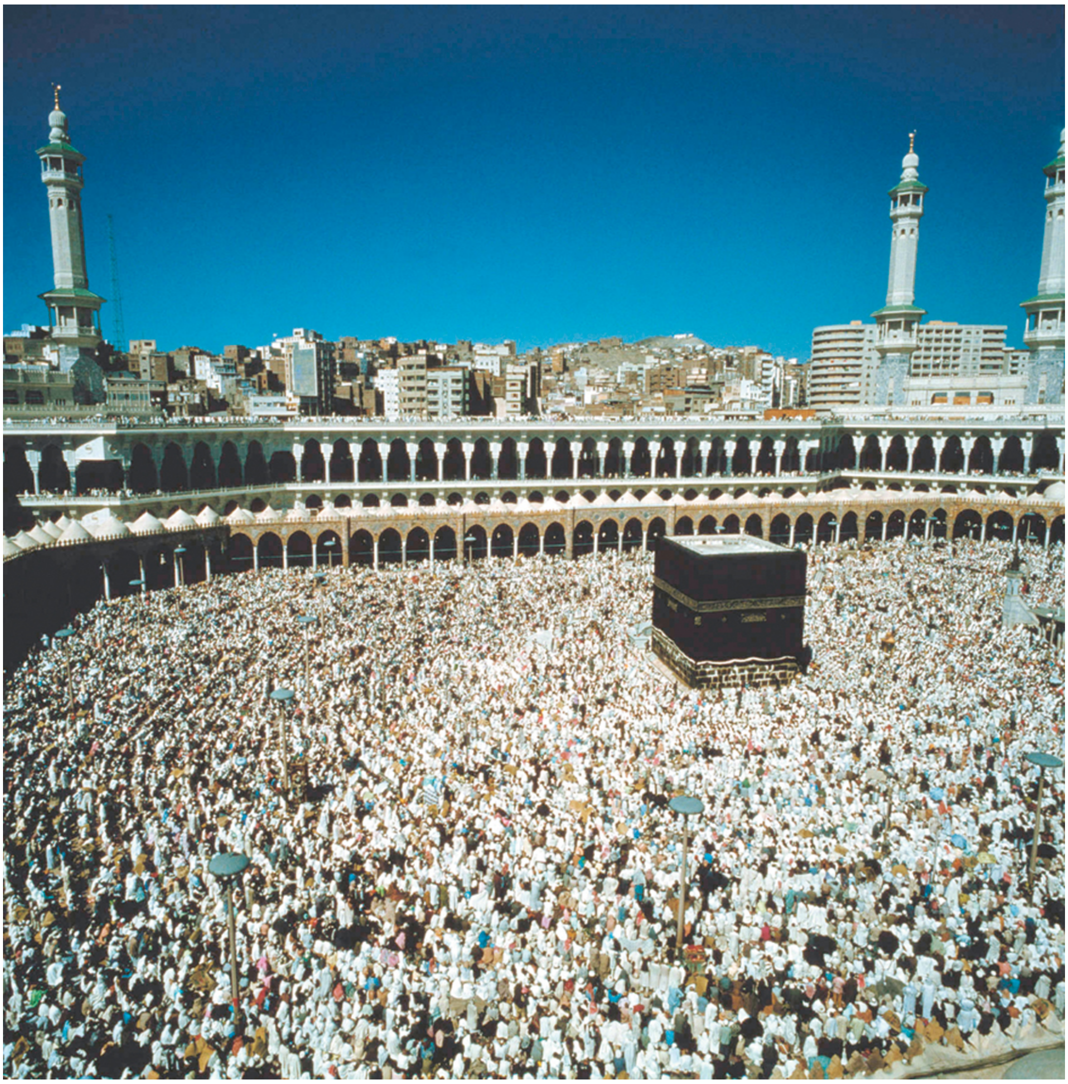
## Christianity

With its estimated 2.5 billion followers—roughly a third of the world's population—Christianity encompasses enormously divergent denominations, sects, and cults (Central Intelligence Agency [CIA], 2023b). Common to all is the belief that Jesus of Nazareth was the Christ (Messiah, or "anointed one") foretold in the Hebrew Bible. Christianity is a form of monotheism—belief in a single all-knowing, all-powerful God—although in most Christian faiths, God is also regarded as a trinity embracing a heavenly Father, his Son the Savior, and his sustaining Holy Spirit.

When Christianity emerged in ancient Palestine some 2,000 years ago, it was a persecuted sect outside mainstream Jewish and Roman religious practices. Yet within four centuries, Christianity had become the official religion of the Roman Empire. In the eleventh century, Christianity divided into the Eastern Orthodox Church (based in Constantinople, now Istanbul) and the Catholic Church (based in Rome). A second great split occurred within the Catholic branch in the sixteenth century, when the Protestant Reformation gave rise to numerous Protestant denominations, sects, and cults. Protestants emphasize a direct relationship between the individual and God, with each person being responsible for their own salvation. Catholics, in contrast, emphasize the importance of the church hierarchy as the means to salvation, with the pope in Rome being the highest earthly authority.

Christianity was spread through conquest and missionary work. The European colonization of much of Africa, Asia, and North and South America that began in the fifteenth century brought Christian teachings, churches, and large-scale conversion of native peoples. In some places,

converts were people from the impoverished classes, for whom Christianity was a means of social mobility. Only in Asia are Christians a small minority, largely because countries such as Japan and China successfully resisted most colonization and its accompanying Christianization.



Every able-bodied Muslim who can afford to is obligated to make the pilgrimage to Mecca, Saudi Arabia. Pilgrims surround the Ka'aba, a small cube-shaped building that houses the Hajar al-Aswad (the Black Stone). Muslims believe that this stone fell from the sky during the time of Adam and has the power to cleanse worshippers of their sins by absorbing them into itself. The stone is believed to have originally been white, but it is said to have turned black because of all the sins it has absorbed.

Recently, Protestant evangelical groups have increased their efforts to convert people throughout the world, making significant inroads in traditionally Catholic countries. Protestant missionaries from the United States not only "spread the Word," but also build homes and orphanages, help local people start small businesses, and engage in a variety of relief and development projects in the Global South (Wuthnow, 2010). Local Protestant missionaries also play a key role. In Mexico, for example, the number of evangelical Protestants grew from 900,000 to 6.1 million between 1970 and 2000, owing to the efforts of local (Mexican) missionaries. Most of this increase has been in rural areas, including areas where Indigenous people predominate. The growth of evangelical Christianity may prove difficult to sustain. It makes considerable demands on its followers, so it remains to be seen whether the children of new converts will stay true to their parents' faith once they become adults (Bowen, 1996; Dow, 2005).

## Islam

As mentioned earlier, Islam is the second-largest, and the fastest-growing, religion in the world today. There are about 2 billion Muslims in the world today, or 25 percent of the global population; that number is predicted to increase to 3 billion (or 31 percent of the global population) by 2060, reaching near parity with the global Christian population (CIA, 2023b; Pew Research Center, 2017). (*Muslim* is the word for those who practice *al-islam*, an Arabic term meaning submission without reservation to God's will.)

Home to an estimated 13 percent of the global Muslim population, Indonesia is the largest Muslim country in the world.

Islam began as a faith of the Arabs and other peoples of the Middle East and has spread into Africa, Central Asia, China, Europe, India, Indonesia, Pakistan, and Russia. Today, some 50 countries have Muslim-majority populations, while more than 60 different ethnic groups of a million or more people practice Islam. In fact, far more non-Arabs than Arabs identify as Muslims. Indonesia, for example, is by far the largest Muslim country in the world. With 232 million adherents, it is home to 13 percent of the global Muslim population (CIA, 2020). A number of non-Muslim countries have large Muslim minorities, among them Hindu-majority India, with 188 million Muslims (14.2 percent of the population), Ethiopia (36.6 million, or 34 percent), and Russia (14.3 million, or 10 percent). Although less than 2 percent of China's population is Muslim, the numbers are nonetheless large (25.1 million) (CIA, 2023a). In 2010, there were 43.5 million Muslims living in Europe, about 6 percent of the total European population (Pew Research Center, 2015c), mostly immigrants seeking better economic opportunities.

Muslims believe in absolute, unquestioning, positive devotion to Allah (God) (Aslan, 2006). Although modern Islam dates to the Arab prophet Muhammad (c. 570–632), Muslims trace their religion to the ancient Hebrew prophet Abraham, also regarded as the founder of Judaism. The

precepts of Islam are believed to have been revealed to Muhammad and are contained in a sacred book dictated to his followers, called the Qur'an (the common English form of the book's name, which means "recitation"). Muhammad's ideas were not accepted in his birthplace of Mecca, so in 622 he and his followers moved to Medina (both in what is today Saudi Arabia). This migration, called the *hegira*, marks the beginning of Islam, which soon spread throughout Arabia. Muslims do not worship Muhammad but regard him as a great teacher and prophet, the last in a line that includes Abraham, Noah, Moses, and Jesus.

Islam is an all-encompassing religion. The sacred *sharia* ("way") includes prescriptions for worship, daily life, ethics, and government. Although U.S. standards might find Muslim beliefs to be extremely restrictive, Muslims frequently view American life as spiritually undisciplined, corrupt, and immoral (Abdul-Rauf, 1975; Arjomand, 1988; Esposito, 1984; Kedouri, 1992; MacEnoin & al-Shahi, 1983; Martin, 1982).

Islam, like Christianity, comprises different religious groups. The principal division is between Sunnis (about 87 to 90 percent of all Muslims) and Shiites (about 10 to 13 percent) (Pew Research Center, 2015a). Sunni Muslims follow a series of traditions deriving from the Qur'an that tolerate a diversity of opinion, in contrast to the more rigid views of Shiites. Shiism split from the main body of orthodox Islam early in its history and has remained influential ever since. Iran (once known as Persia) is the only major Islamic country that is overwhelmingly Shiite, although there are Shiite majorities in several other countries, including Iraq. Large numbers of Shiites are found in other Middle Eastern countries and in Turkey, Afghanistan, India, and Pakistan. A sect known as Sufism encompasses more mysticism and rituals than the practice by Sunnis and Shiites (Pew Research Center, 2012).

Shiism has been the official religion of Iran since the sixteenth century and was fundamental to the religiously conservative Iranian Revolution of 1978–1979. The Shiites trace their beginnings to Imam Ali, a seventh-century religious and political leader who showed outstanding virtue and personal devotion to God. Ali's descendants were considered the rightful leaders of Islam because they were held to belong to the prophet Muhammad's family, unlike the dynasties actually in power. The Shiites believed that the rule of Muhammad's rightful heir would eventually be instituted, doing away with the tyrannies and injustices associated with

existing regimes. Muhammad's heir would be a leader directly guided by God, governing in accordance with the Qur'an.

There is no separation of church and state in a few highly religious Islamic societies, such as Iran. In most Muslim countries, however, religious leaders live in uneasy alliance with secular governments. Algeria, Egypt, Indonesia, and Turkey, for example, are all predominantly Muslim societies in which mosque and state are separate. Some countries such as Jordan, Morocco, and Turkey, where more religiously traditional Islamist parties have won recent elections, have not lost basic democratic values or the fundamental separation of mosque and state.

## Judaism

With 16 million followers worldwide, Judaism is by far the smallest of the world's major religions. Jews were among the first people to practice monotheism. According to Jewish beliefs, some 3,500 years ago, God entered into a covenant with Abraham, a descendant of Noah: Abraham was to spread the word of God, and he in turn would father a "great nation" (Genesis 12:2) in the land that now includes Israel. As a symbol of this covenant, all the male descendants of Abraham were to be circumcised in a ritual ceremony eight days after birth.

The story of Abraham and his descendants is told in the first five books of the Bible, called the Torah ("teachings" or "law"), which provide a foundation for Jewish religious beliefs (as well as those of the other "Abrahamic" traditions, Christianity and Islam). These teachings include the Ten Commandments, which, according to the Torah, were among the laws God revealed to Moses during the 40 years the Jews wandered in the Sinai Desert after escaping from Egyptian slavery. According to Jewish tradition, the entire Torah is read in an annual cycle during religious services. The Jewish Bible is made up of 24 books: the Torah, the writings of the prophets, philosophical works (for example, the Book of Job), and poetry (such as the Psalms). In the Christian tradition, these books are collectively known as the Old Testament, to distinguish them from the New Testament, which focuses on the story and teachings of Jesus. Later texts that are central to Jewish beliefs include the Talmud, a compendium of the debates and teachings of Jewish rabbis (religious teachers) over many centuries.

After their desert wanderings, the Jews eventually conquered the land promised by God to Abraham, encompassing what is today Israel, Lebanon, and the west bank of the Jordan River, along with coastal parts of Jordan, Egypt, and Syria. Jerusalem became the religious center and political capital of the Jewish nation some 3,000 years ago, although it was conquered numerous times by various empires during the next thousand years. During times of conquest, some Jews began to flee to other countries, in what later became known as the Diaspora (exile or "scattering"). During the first century after Jesus, the Diaspora became complete: Following an unsuccessful revolt against their Roman conquerors, the remaining Jews were forced to settle throughout Europe and parts of North Africa and the Middle East. Throughout this period, religious Jews lamented the loss of Jerusalem; every year, after recounting the escape of the Jews from Egyptian slavery during the ritual Passover meal called the *seder* ("order"), the vow was made: "next year in Jerusalem."

Judaism has exerted an influence greater than its limited numbers would suggest. First, as noted, it is the source of the world's two largest religions, Christianity and Islam. Second, in European and U.S. culture, Jews have played a role disproportionate to their numbers in such diverse fields as music, literature, science, education, and business. Third, the existence of Israel as a Jewish state since 1948 has given the Jewish faith international prominence. Israel has existed in nearly constant tension with many of its neighboring Arab countries since its founding and has seldom been out of the news.

Jews have often suffered persecution. From the twelfth century on, European and Russian Jews were often forced to live in special districts termed "ghettos," where they lacked full rights as citizens and were sometimes the target of harassment, attacks, and murders. Partly in reaction to these conditions, and partly because the Torah identifies the city of Jerusalem as the center of the Jewish homeland, some Jews embraced *Zionism*, a movement calling for the return of Jews to ancient Palestine and the creation of a Jewish state. (Zion is a biblical name for the ancient city of Jerusalem.) Although secular Zionists viewed Israel as a country where persecuted Jews could seek refuge, religious Zionists saw it as the one Jewish homeland and saw returning to it as fulfilling biblical prophecies. Zionists established settlements in Palestine early in the twentieth century, living relatively peacefully with their Arab and

Palestinian neighbors. However, after World War II and the Nazi extermination of 6 million Jews during the Holocaust, the League of Nations, and subsequently the United Nations, approved the creation of the state of Israel as a homeland for the survivors. This action ended the once relatively peaceful relationship between Zionists and their neighbors.

## Hinduism

Hinduism, which dates to about 2000 b.c.e., is one of the world's oldest religions. It is not based on the teachings of any individual, and its followers do not trace their national origins to a single god. Hinduism is an ethical religion that calls for an ideal way of life. There were over 1.2 billion Hindus worldwide in 2023, composing 15 percent of the global population; 94 percent of the world's Hindu population (974 million) lives in India, composing 80 percent of India's population (CIA, 2023b; Pew Research Center, 2017).

As we saw in Chapter 8, India's social structure is characterized by a caste system in which people are believed to be born into a certain status that they occupy for life. Although the caste system was officially abolished in 1949, it remains powerful. The caste system has its origins in the Hindu belief that an ideal life is partly achieved by performing the duties appropriate to one's caste.

Perhaps because Hinduism does not have a central organization or leader, its philosophy and practice are extremely diverse. Religious teachings direct all aspects of life, but in a variety of ways—ranging from promoting the enjoyment of sensual pleasures to advising the renunciation of earthly pursuits. Mohandas Gandhi was a modern example of a man who devoted his life to the Hindu virtues of "honesty, courage, service, faith, self-control, purity, and nonviolence" (Potter, 1992).

Despite the teaching that life is *maya*, or "illusion," Hindu religious beliefs have an earthly quality. For example, although temples and pilgrimage centers are located on sacred sites, any location may be a place of devotion. Hindus believe in the godlike unity of all things, yet their religion also has aspects of polytheism—the belief that different gods represent various categories of natural forces. For example, Hindus

worship gods representing aspects of the whole, such as the divine dimension of a spiritual teacher (Basham, 1989; Kinsley, 1982; Potter, 1992; Schmidt, 1980).

# Religion in the United States

As we noted earlier, in comparison with citizens of other industrial nations, Americans are highly religious. Even though secularization may have weakened the power of religious institutions in the United States, it has not significantly diminished the strength of religious beliefs. In 2022, fewer than half (46 percent) of all American adults said religion is “very important” in their lives, a marked decline from a decade ago (when the figure was about 56 percent); 81 percent reported believing in God (down from 92 percent), while 20 percent said they attend religious services weekly (down from 28 percent) (Gallup, 2022; Jones, 2022b).

Yet one long-term measure of religiosity, based on indicators such as belief in God, religious membership, and attendance at religious services, found that the index reached its highest levels in the 1950s and has declined ever since—in part because post–World War II baby boomers were less religious, at least in the traditional sense, than their predecessors (Roof, 1999). In one national survey, overwhelming majorities of Catholics, liberal Protestants, and conservative Protestants reported attending church weekly when they were children, although their attendance had dropped sharply by the time they reached their early twenties. Among the three groups, attendance had declined the most among liberal Protestants and the least among conservative Protestants (Roof, 1999).

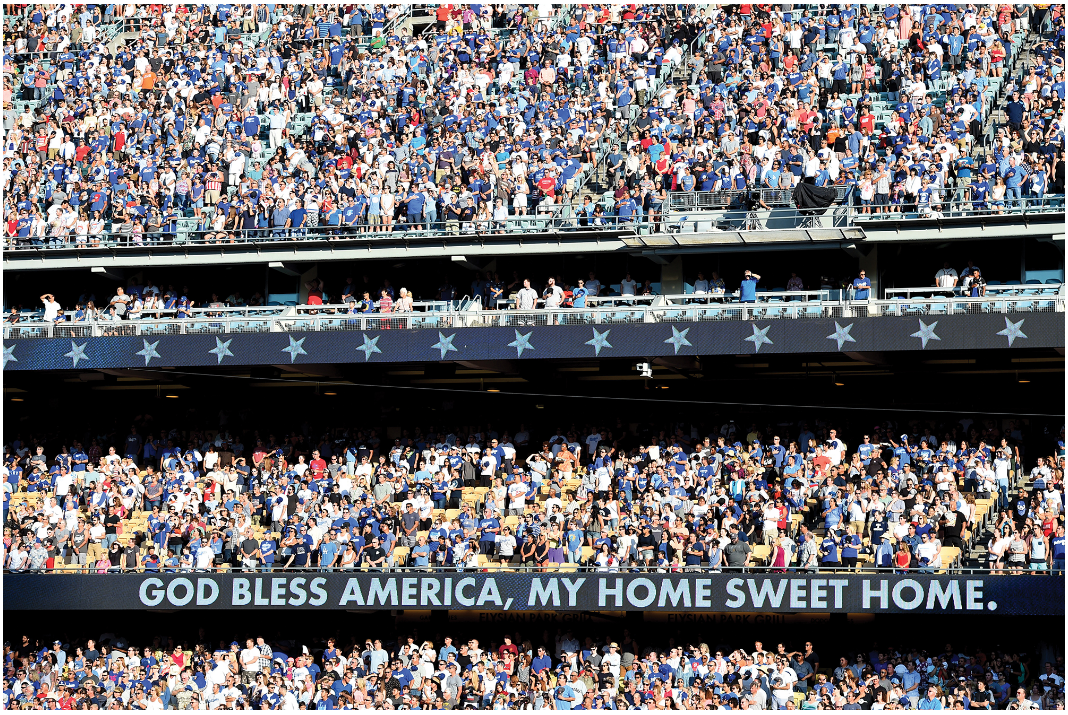
Another survey of nearly 114,000 adults in 1990 and more than 50,000 adults in 2007 found that religious identification had declined sharply during the 17-year period. In 1990, 90 percent of all respondents identified with some religious group; in 2007, the figure was 83 percent. By 2014, the proportion of American adults who were religiously affiliated had dropped even further, to 77 percent. The principal decline has been among self-identified Christians (from 78 percent in 2007 to 71 percent in 2014), specifically mainline Protestants and Catholics. In contrast, the number of adults who report no religious affiliation is growing, referred to as the “rise of the nones.” In 2020, religious

“nones”—people who identify as atheists or agnostics or who say their religion is “nothing in particular”—composed 30 percent of the U.S. adult population, up from 16 percent in 2007. Much of this growth can be tied to generational replacement: 40 percent of millennials are religiously unaffiliated (Pew Research Center, 2019b, 2022d).

## Civil Religion

Although there is a constitutional separation of church and state in the United States, all U.S. presidents have attended church, and some have been deeply and publicly religious. In fact, sociologists have argued that the United States has a civil religion—a set of religious beliefs through which a society interprets its own history in light of some conception of ultimate reality (Bellah, 1968, 1975). Civil religion usually consists of “god-language used in reference to the nation,” including “historical myths about the society’s divine origins, beliefs about its sacred historical purpose, and occasionally religious restrictions on societal membership” (Wuthnow, 1988). The notion that westward expansion in the nineteenth century was America’s “Manifest Destiny” is one example.

The importance of civil religion in the United States is seen in the Pledge of Allegiance. By referring to “one nation, under God,” the pledge infuses civic life with a religious belief derived from the Judeo-Christian heritage. Congress added the phrase “under God” in 1954, during the height of Cold War fears about “godless communism.” Even though the Bill of Rights of the U.S. Constitution calls for a separation of church and state, the Pledge posits a theistic religious belief as central to U.S. citizenship. Every president of the United States, whether religious or not, professes to be so and regularly attends church.




Evidence of a civil religion can be seen in the singing of "God Bless America" at sporting events such as Major League Baseball games.

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Constitutional separation of church and state notwithstanding, many Americans believe that the United States is fundamentally a Christian nation. Growing religious diversity is challenging this assumption. While Americans often pride themselves on the right of everyone to freely pursue their own faiths, they seldom actually interact with people who do not share the same beliefs and so have little understanding of religious differences. Sociologist Robert Wuthnow (2007), whose research focuses on the effects of religious diversity, calls for a strategy of "reflective pluralism" as a means to promote greater religious understanding.

## Trends in Religious Affiliation

One reason so many Americans are religiously affiliated is that religious organizations are an important source of social ties and friendship networks. Churches, synagogues, and mosques are communities of people with shared beliefs and values who support one another during times of need. Religious communities thus often play a family-like role. About 68 percent of Americans identify as Christian (including 23 percent who identify as Catholic), 2 percent as Jewish, 0.9 percent as

Muslim, 0.7 percent as Buddhist, and 0.7 percent as Hindu (CIA, 2023a; Gallup, 2022).

**Protestantism: The Growing Strength of Conservative Denominations** A clearer picture of trends in American religion emerges if we break down the Protestant category into major subgroups. According to the U.S. Religious Landscape Survey of more than 35,000 adults in 2014, Baptist households account for 33 percent of all Protestants. There were far fewer Methodists (10 percent), Pentecostals (10 percent), Lutherans (8 percent), Presbyterians (5 percent), and Episcopalians (3 percent). More than half of all Protestants (60 percent) describe themselves as evangelical (Smith, 2021). These figures indicate the growing strength of conservative Protestants, who emphasize a literal interpretation of the Bible, morality in daily life, and conversion through evangelizing. In contrast are the more historically established liberal (or mainline) Protestants, who adopt a more flexible, humanistic approach to religious practice. Somewhere in between are moderate Protestants.

Since the 1960s, the more liberal Protestant churches have experienced declining membership, whereas the number of evangelical Protestants has increased: The more evangelical denominations inspire deep loyalty and commitment, and are highly effective at recruiting new members, particularly young people. Today, 25 percent of all American adults belong to evangelical Protestant churches, compared with only 15 percent belonging to more liberal ones (Pew Research Center, 2015c).

Liberal Protestantism, in particular, has suffered. The aging members of the liberal Protestant denominations have not been replaced, commitment is low, and some current members are switching to other faiths. From 1965 to 1989—a time when mainline Protestant denominations began to decline in favor of evangelical churches—losses were substantial for Lutherans, United Methodists, the United Church of Christ, Episcopalians, Presbyterians, and Disciples of Christ. Together, these six denominations lost nearly 23 million members—almost the same number that was gained by such conservative Protestant denominations as the Southern Baptists, the Church of the Nazarene, the Seventh-day Adventists, the Assemblies of God, the Church of God, and the Church of Jesus Christ of Latter-day Saints. Between 1990 and 2008, the four largest mainline denominations—Methodists, Lutherans, Presbyterians, and Episcopalians—lost an additional 4 million members, a decline of 13 percent from 1990 (U.S. Bureau of the Census, 2012). At the same time,

Black Protestant churches have thrived in the United States, as their members move into the middle class and achieve economic and political prominence (Finke & Stark, 2005; Roof & McKinney, 1990).

**Catholicism** Catholics make up about a fifth of the U.S. population. The number of Catholics appears to be declining, in part because more people are leaving Catholicism for another faith than are joining the church: Of the nearly one-third of Americans who were born Catholic, 41 percent no longer identify with the Catholic Church (Pew Research Center, 2015c). Church attendance among Catholics has also declined. In 1975, 47 percent of Catholics reported attending Mass at least once a week. By 2017, that figure had dropped to 39 percent (Saad, 2018). While church attendance has declined for Catholics of all ages, the drop has been sharpest for young Catholics (ages 18 to 29); currently, only about 30 percent of young Catholics attend church every week. A 2021 national survey conducted by the Center for Applied Research in the Apostolate found that 13 percent of young adult Catholics (18 to 35 years of age) attended church at least once a week before the Covid-19 pandemic (Gray et al., 2021). While the reasons for such declines are unclear, one reason likely involves the 1968 papal encyclical *Of Human Life* (*Humane Vitae*), which reaffirmed the ban on all forms of artificial contraception by Catholics. People whose conscience allowed for the use of contraceptives were faced with disobeying the church, and many did just that. According to a 2015 Pew survey, three-quarters (76 percent) of U.S. Catholics say the church should allow the use of birth control (Pew Research Center, 2015d).

**Other Religious Groups** Judaism in the United States has historically been divided into three major movements: Orthodox Judaism, which believes in the divine origins of the Jewish Bible (as previously noted, called the Old Testament by Christians) and follows highly traditional religious practices; Conservative Judaism, which is a blend of traditional and more contemporary beliefs and practices; and Reform Judaism, which rejects most traditional practices and is progressive in its ritual practices (services, for example, are more likely to be conducted in English than in Hebrew). Both Conservative and Reform Judaism reflect efforts by Jewish immigrants (or their descendants) to develop beliefs and rituals that turned away from "Old World" ones, developing forms more consistent with their new homeland. Reform Judaism is the largest Jewish

denominational movement in the United States, constituting 37 percent of all American Jews in 2020 (Pew Research Center, 2021c).

Despite (or perhaps partly because of) these efforts to modernize Judaism, the number of Jews in the United States has declined as a result of low birthrates, intermarriage, and assimilation. According to a 2022 Gallup Poll, the percent of U.S. adults who identify as Jewish has declined from about 10 percent of the U.S. population to about 2 percent since the late 1950s (Gallup, 2022). Intermarriage rates are also on the rise; over 60 percent of Jews who have gotten married since 2010 have a non-Jewish spouse (Pew Research Center, 2021d). Estimates of the number of Jewish Americans in the United States today vary widely, which may reflect precisely how Jews are identified and counted. Some Americans identify as Jewish if they have a Jewish mother—even if they have never practiced their religion. Some may self-identify as Jewish only if they participate actively in the religion, whereas others still may identify as "culturally Jewish," meaning they celebrate their heritage and culture but do not actively practice the religion.

Among Muslims, growing emigration from Asia and Africa may change the U.S. religious profile. *The CIA World Factbook* estimates that in 2023 there were approximately 3 million Muslims in the United States, accounting for almost 1 percent of the population (CIA, 2023a). It is projected that this share will double by 2050 (Mohamed, 2016). A majority of Muslim Americans (63 percent) are first-generation immigrants to the United States, with many coming from the Asia-Pacific region, the Middle East, North Africa, and sub-Saharan Africa (Lipka, 2017).

# New Religious Movements

Today, sociologists are aware that the terms *sect* and *cult* have negative connotations, so instead they sometimes use the phrase *new religious movements* to characterize novel religious organizations lacking the respectability that comes with being well established for a long period (Hadden, 1997b; Hexham & Poewe, 1997). New religious movements encompass an enormously diverse range of religious and spiritual groups, cults, and sects that have emerged in Western countries, including the United States, alongside mainstream religions. One example is the

Unification Church, founded by the Korean Sun Myung Moon. The cult boasts a membership of 50,000 in the United States and 3 million worldwide (Melton, 1996). Other new religious movements include Scientology, Wicca, Eckankar, Druidism, Lucumí (also called Santería), and Rastafarianism. Their beliefs might seem unusual mixtures of traditional and modern religious ideas, but in fact, all long-established religions mix elements from diverse cultural sources.

This change in characterization has proven to be controversial, however. A loosely knit "anti-cult movement" composed of academics, church groups, families of cult members, and some former cult members themselves argues that regarding cults simply as "new religious movements" masks their identity as fringe organizations that can be dangerous and even deadly. Janja Lalich, a sociologist who at one time belonged to a political organization she now views as a cult, argues that cults can be distinguished from new religious movements by the virtually total control they exert over members' daily lives and thinking. Cult members, she argues, exist in a situation of "bounded choice": However seemingly irrational, harmful, or even fatal their acts (as in the examples of Heaven's Gate and Aum Shinrikyo), they are done "in a context that makes perfect sense at the time to those who [perform the acts] and are, in fact, consistent with an ideology or belief system that [the members] trust represents their highest aspirations" (Lalich, 2004). Cult members are socialized into a way of thinking that is all-encompassing; they are not permitted to question the authority of the cult leader and so come to view the cult's beliefs, however bizarre or dangerous, as normal.

From the new religious movement perspective, cults—like all religious movements—can be best understood sociologically as a subtype of social movements. A religious movement is an association of people who spread a new religion or promote a new interpretation of an existing religion. From this perspective, all sects and cults can be classified as religious movements. Examples of religious movements include the groups that originally founded and spread Christianity in the first century, the Lutheran movement that split Christianity in Europe about 1,500 years afterward, and the groups involved in the more recent Islamic Revolution (discussed later in the chapter).

Members of the Heaven's Gate cult, who killed themselves in a mass suicide in 1997.

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Religious movements pass through phases of development. In the first phase, the movement derives life and cohesion from a powerful leader. Max Weber classified such leaders as charismatic—that is, having inspirational qualities capable of capturing the imagination and devotion of a mass of followers. (Charismatic leaders in Weber's formulation could include political as well as religious figures—revolutionary China's Mao Zedong, for example, as well as Jesus and Muhammad.) The leaders

of religious movements usually criticize the religious establishment and proclaim a new message. In their early years, religious movements are fluid; they do not have an established authority system. Their members are normally in direct contact with the charismatic leader, and together they spread the new teachings.

The second phase occurs following the death of the charismatic leader, when the movement must face what Weber termed the "routinization of charisma." To survive, the movement has to create formalized rules and procedures because it can no longer depend on the central role of the original leader in organizing the followers. Many movements fade away when their leaders die or lose influence. A movement that takes on a permanent character becomes a church—a formal organization of believers with an established power structure and established symbols and rituals. The church itself might later become the source of other movements that question its teachings and either set themselves up in opposition to the church or break away.

Many new religious movements are derived from mainstream religious traditions, such as Hinduism, Christianity, and Buddhism, whereas others have emerged from traditions that were almost unknown in the West until recently. Some new religious movements are creations of the charismatic leaders who head their activities. This is the case with the previously mentioned Unification Church, led by the Reverend Sun Myung Moon until his death in 2012, when his widow, Hak Ja Han, became the church's spiritual leader. Members are expected to fraternize only with one another, to donate their property to the church, and to obey the church's commands. This new religious movement was introduced into the United States at the beginning of the 1960s, and it appealed to many who were rejecting traditional religion and looking for insight in Eastern religious teachings. Membership in new religious movements mostly consists of converts rather than individuals brought up in a particular faith. Members are usually well educated and from middle-class backgrounds.

Various theories explain the popularity of new religious movements. Some observers argue that they reflect liberalization and secularization within society and within traditional churches. People who feel that traditional religions have become ritualistic and devoid of spiritual meaning may find comfort and a greater sense of community in smaller, less impersonal new religious movements. Others see new religious

movements as an outcome of rapid social change (Wilson, 1982). As traditional social norms are disrupted, people search for explanations and reassurance. The rise of groups and sects emphasizing personal spirituality, for example, suggests that many individuals need to reconnect with their own values or beliefs in the face of instability and uncertainty.

Furthermore, new religious movements may appeal to people who feel alienated from mainstream society. The collective, communal approaches of sects and cults, some authors argue, can offer support and a sense of belonging. For example, today's middle-class youth are not marginalized from society in a material sense, but they may feel isolated emotionally and spiritually. Membership in a cult can overcome this alienation (Wallis, 1984).

New religious movements fall into three broad categories: *world-affirming*, *world-rejecting*, and *world-accommodating* movements. Each category is based on the relationship of the group to the larger social world. The enduring popularity of new religious movements presents another challenge to the secularization thesis. Opponents point to the diversity and dynamism of new religious movements and argue that religion and spirituality remain central facets of modern life. As traditional religions lose their hold, they claim, religion is not disappearing but is heading in new directions. Not all scholars agree, however. Proponents of secularization hold that these movements remain peripheral to society, even if they profoundly affect the lives of their followers. New religious movements are fragmented and relatively unorganized; they also suffer from high turnover rates. Compared to a serious religious commitment, proponents argue, participation in a new religious movement appears to be little more than a hobby or lifestyle choice.

## World-Affirming Movements

World-affirming movements are more like self-help or therapy groups than conventional religious groups. These movements often lack rituals, churches, or formal theologies, focusing instead on members' spiritual well-being. World-affirming movements do not reject the outside world or its values. Rather, they seek to enhance their followers' abilities to perform and succeed in that world by unlocking human potential.

World-affirming movements such as the Church of Scientology, which was established by science fiction writer L. Ron Hubbard in 1954, are inclusive and focus on members' spiritual well-being.

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The Church of Scientology is one such group. Founded by L. Ron Hubbard, it has grown from its original base in California to include a large membership worldwide. Scientologists believe that all people are spiritual beings but have neglected their spiritual nature. Through training that makes them aware of their real spiritual capacities, people can recover forgotten supernatural powers, clear their minds, and reveal their full potential.

Many strands of the so-called New Age movement are world-affirming movements. The New Age movement emerged from the counterculture of the 1960s and 1970s and encompasses a broad spectrum of beliefs, practices, and ways of life. Pagan teachings (Celtic, Druidic, Native American, and others), shamanism, forms of Asian mysticism, Wiccan rituals, and Zen meditation are among activities thought of as New Age.

The mysticism of the New Age movement appears to contrast with the modern societies in which it is favored. Followers of New Age movements develop alternative ways of life to cope with the challenges of modernity. Yet New Age activities should not be interpreted as simply a radical break with the present. They are also part of a larger cultural trajectory exemplifying mainstream culture. In modern societies,

individuals possess unparalleled degrees of autonomy and freedom to chart their own lives. The aims of the New Age movement thus coincide closely with those of the modern age: People are encouraged to move beyond traditional values and expectations and to live actively and reflectively.

## World-Rejecting Movements

World-rejecting movements are highly critical of the outside world and often demand significant lifestyle changes from their followers—such as living ascetically, changing their dress or hairstyle, or following a certain diet. World-rejecting movements are frequently exclusive, in contrast to world-affirming movements, which are inclusive. Some world-rejecting movements display characteristics of total institutions; members subsume their individual identities into that of the group, follow strict ethical codes or rules, and withdraw from activity in the outside world.

Most world-rejecting movements demand more of their members, in terms of time and commitment, than do older established religions. Some groups use the technique of "love bombing" to gain the individual's total adherence. A potential convert is overwhelmed by attention and constant displays of affection until they are drawn emotionally into the group. The Unification Church reportedly employs this technique. Some new movements, in fact, have been accused of brainwashing their adherents—robbing them of the capacity for independent decision making (Lalich, 2004).

Many world-rejecting cults and sects have come under the intense scrutiny of state authorities, the media, and the public. Certain extreme cases have attracted much concern. The Branch Davidian cult, based in Waco, Texas, became embroiled in a deadly confrontation with federal authorities in 1993 after accusations of child abuse and weapons stockpiling. Eighty members of the cult (including 19 children) burned to death in their compound during an assault by federal officials that ended a lengthy armed standoff. Federal officials maintain that the cult members were virtual prisoners of their charismatic leader, David Koresh, who was allegedly stockpiling illegal weapons, had numerous wives, and was having sex with some of the children. Controversy remains over whether the fire was ordered by Koresh, who reportedly

preferred mass suicide to surrender, or the actions of the federal authorities caused the tragedy (Tabor & Gallagher, 1995).

### World-Accommodating Movements

World-accommodating movements emphasize the importance of inner religious life over more worldly concerns. Members of such groups seek to reclaim the spiritual purity that they believe has been lost in traditional religious settings. Whereas followers of world-rejecting and world-affirming groups may alter their lifestyles in accordance with their religious activity, many adherents of world-accommodating movements carry on their lives and careers with little visible change. One example is Pentecostalism, a Christian renewal movement that emphasizes the direct, ecstatic experience of God that its adherents believe existed at the time of Christ. Pentecostals believe that the Holy Spirit can be heard through individuals who are granted the gift of "speaking in tongues."

## Religious Affiliation and Socioeconomic Status

Substantial socioeconomic and regional differences exist among the principal religious groupings in the United States. Liberal Protestants are well educated, somewhat upper income, and middle or upper class. Ethnically, they generally comprise White Anglo-Saxon Protestants (WASPs) of British or German origins. Moderate Protestants have a lower level of education, income, and social class. In fact, they are typical of the national average on these measures. Moderate Protestants are from a variety of European ethnic backgrounds, including British, German, Scandinavian, Irish, and Dutch. Black Protestants are the least educated and poorest of any of the religious groups listed. Conservative Protestants have a similar profile, although they are at a slightly higher level on all these measures. They comprise a diverse profile of European ethnicities, although some are African American as well. Nearly half of all Protestants live in the South (Pew Research Center, 2015c).

Catholics strongly resemble moderate Protestants in terms of their socioeconomic profile. The largest ethnic group is European in origin (primarily German, Italian, Slavic, and Irish, and, to a lesser extent,

English and French), followed by Latinos from Mexico and Central and South America. Catholics are pretty evenly distributed across the United States, though we are witnessing a shift from the Northeast and Midwest to the South and West (Pew Research Center, 2015c).

Jews have the highest socioeconomic profile. Most are college graduates in middle- or upper-income categories. One study found that Jewish educational and occupational attainment was significantly higher than that of other Whites. Jews are largely European in origin, particularly Eastern European and German, although some are from northern Africa. Whereas the large majority of Jews once lived in the Northeast, today less than half do. One recent study suggests that their high degree of geographical mobility is associated with lowered involvement in Jewish institutions. Jews who move throughout the country are less likely to belong to synagogues or temples, have Jewish friends, or be married to Jewish spouses (Goldstein & Goldstein, 1996; Hartman & Hartman, 1996; Pew Research Center, 2008; Roof & McKinney, 1990).

In sum, Jews and liberal Protestants are the most heavily middle and upper class; moderate Protestants and Catholics are somewhat in the middle (although the growing number of poor Catholic Latino immigrants may be changing this position); conservative and Black Protestants are overwhelmingly lower class. These groupings correspond roughly with social and political liberalism and conservatism as well. In terms of civil liberties, racial justice, and women's rights, Jews are, by far, the most tolerant. Liberal Protestants and Catholics are somewhat more tolerant than the average American, while moderate Protestants and Black Protestants are somewhat less tolerant. Conservative Protestants are the least tolerant of all religious groupings (Roof & McKinney, 1990). For example, according to a 2015 poll conducted by the Pew Research Center (2015c), while three-quarters of Jews strongly favor same-sex marriage, the same is true for less than half (45 percent) of all Christians and just a quarter (28 percent) of evangelical Protestants.

There are political differences across religious groups as well. Jews are the most heavily Democratic; fundamentalist and evangelical Christians, the most Republican. The more moderate Protestant denominations are somewhere in between (Kosmin et al., 2001).

# Gender and Religion

Like other social institutions, churches and denominations have, on the whole, excluded women from power. The following sections examine some of the interrelations of religion and gender. This is an area in which significant changes are occurring.

## Religious Images

In Christianity, although Mary, the mother of Jesus, is sometimes treated as having divine qualities, God is "the Father," a male figure, and Jesus took the human shape of a man. Genesis, the first book of the Bible, teaches that woman was created from a man's rib. These facts have not gone unnoticed by women's movements. Over a hundred years ago, Elizabeth Cady Stanton published a series of commentaries on the Scriptures, titled *The Woman's Bible.* In her view, the deity had created women and men as beings of equal value, and the Bible should fully reflect this fact. The "masculinist" character of the Bible reflected the fact that it was written by men. In 1870, the Church of England established a Revision Committee to revise and update the biblical texts, but the committee contained no women. Stanton asserted that there was no reason to suppose that God is a man, because it was clear in the Scriptures that all human beings were fashioned in the image of God. She subsequently organized the Women's Revision Committee in America, composed of 23 women, to advise her in preparing *The Woman's Bible*, which was published in 1895.

In some Buddhist orders, especially Mahayana Buddhism, women are represented in a favorable light. But, on the whole, Buddhism is "an overwhelmingly male-created institution dominated by a patriarchal power structure," in which the feminine is mostly "associated with the secular, powerless, profane, and imperfect" (Paul, 1985). The contrasting pictures of women that appear in Buddhist texts no doubt mirror the ambiguous attitudes of men toward women in the secular world: Women are portrayed as wise, maternal, and gentle, yet also as mysterious, polluting, and destructive, threatening evil.

## The Role of Women in Religious Organizations

In both Buddhism and (later) Christianity, women were allowed to express strong religious convictions by becoming nuns. Although the first

orders for women were probably established in the twelfth century, their membership remained small until the 1800s. At that time, many women took religious vows to become teachers and nurses because these occupations were largely controlled by the religious orders. Nonetheless, female religious orders remained subject to a male hierarchy, and elaborate rituals reinforced this subjugation. For example, all nuns were regarded as “brides of Christ.” Until some orders made changes in the 1950s and 1960s, “marriage” ceremonies were carried out, during which the novice would cut her hair, receive her religious name, and sometimes be given a wedding ring. After several years, a novice would take a vow of perpetual profession, after which she was required to receive dispensation if she chose to leave.

Today, women play an increasingly important role as religious leaders. Nadia Bolz-Weber is the founding pastor of House for All Sinners and Saints, an evangelical Lutheran church in Denver, Colorado.

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Women's orders today show considerable diversity. In some convents, nuns still dress in traditional habits and live in communities removed from the secular world. In other convents, nuns wear ordinary dress and live in apartments or houses. Traditional restrictions, such as not talking

to others during certain periods of the day or walking with hands folded and hidden under the habit, are rarely evident.

Despite such liberalization, women have filled only lower-status positions in religious organizations. This situation is changing, in line with changes affecting women in society generally. In recent years, women's groups have pressed for equal status in religious orders. Increasingly, the Catholic and Episcopalian churches are under strong pressure to allow women an equal voice in their hierarchies. Yet in 1977, the Sacred Congregation for the Doctrine of the Faith in Rome declared that women could not be admitted to the Catholic priesthood; the reason was that Jesus had not called a woman to be one of his disciples. Ten years later, 1987 was officially designated the "Year of the Madonna," during which the Congregation advised women to recall their traditional role as wives and mothers.

The barriers to Catholic women in the hierarchy of the church thus remain formidable. In a letter published in May 1994, Pope John Paul II reaffirmed the Roman Catholic Church's ban on the ordination of women. And in July 2010, in response to widely publicized scandals involving priests who had sexually abused children, the Vatican strengthened its rules on such abuses, characterizing them as "grave crimes"—but the same decree also extended the list of "grave crimes" to include any priest who ordained a woman. Catholic organizations that favored the ordination of women priests complained that the decree implied that female ordination and pedophilia were equally grave offenses (Bates, 2010; Talbot, 2021).

The Episcopal Church has allowed women into its priesthood since 1976. Altogether, women have been ordained as ministers in about half the Protestant denominations in the United States, including the Presbyterian Church (U.S.A.), the Evangelical Lutheran Church in America, the African Methodist Episcopal Church, and the United Methodist Church. And, except within Orthodox Judaism, women in the United States can become rabbis as well.

## Women and Islam

Despite the resurgence of traditional Islamist views in some parts of the Muslim world in recent years, Muslim women in most countries continue

to experience a high degree of freedom and equality. As noted in Chapter 13, women have served as heads of state in such predominantly Muslim nations as Bangladesh, Pakistan, and Turkey. The first person to found a university was reportedly a Muslim woman, Fatima al-Fihri, who founded a Moroccan university in the ninth century. In Afghanistan, before the militant Islamic nationalists known as the Taliban took over in 1996, women played prominent roles: Shafiqa Habibi was the country's most popular television news anchor, her face (uncovered) known throughout the country. During the Taliban's rule, she spent her time at home, hidden from public view. When she ventured out, her body had to be covered by a *burka*, a traditional tentlike garment with a screen sewn into the fabric over her face to hide her eyes but allow some ability to see (Filkins, 1998).

Habibi's experience was shared by all Afghan women. The Taliban's extreme Islamic beliefs forbade women from working outside the home, attending school, or appearing in public without covering their bodies from head to toe. Women seen in public with any man who was not their husband or relative were brutally beaten or killed. When the Taliban was overthrown in 2001, women regained their rights in Afghanistan, at least in the capital city of Kabul. But when the Taliban seized control of the country in 2021, women again their lost rights.

There is a debate among Muslim scholars as to whether Islam in fact requires severe restrictions on the role of women. At one extreme, the highly conservative interpretation sometimes known as Wahhabism (after the name of its nineteenth-century founder) has led to the severe treatment of women practiced by the Taliban. This strict version of Islam is strongly practiced in oil-rich Saudi Arabia, which has funded *madrassas* ("schools") throughout the Muslim world, where Wahhabism is taught. A more moderate view of women's roles—which still calls for restrictions such as veiling—was advanced by the prominent Iranian philosopher Ali Shariati. In his view, women should be veiled both because this reflects the chastity and piety of Muhammad's daughter Fatima, and because it represents defiance of the Western view of women (Aslan, 2006; Shariati, 1971). Many Muslim women voluntarily choose to veil themselves, out of religious belief or as a cultural rejection of Western attitudes toward what is proper for women; a feminist case for wearing the veil can also be made (Elver, 2012; Francois-Cerrah, 2014).

A feminist view is offered by Amina Wadud in her book *Qur'an and Woman: Rereading the Sacred Text from a Woman's Perspective* (1999). Wadud argues that women's inferior status in some Muslim-majority countries results partly from Islam's origins in seventh-century Arabia, where women were relegated to an inferior status, and partly from the hostility toward women that has characterized centuries of male-centered interpretations of the Qur'an. Reza Aslan (2006), an Iranian-born American sociologist who has written extensively on Islam, states the feminist position succinctly:

> As Shirin Ebadi proudly declared while accepting the 2003 Nobel Peace Prize for her tireless work in defending the rights of women in Iran, "God created us all as equals. . . . By fighting for equal status, we are doing what God *wants* us to do." . . . The so-called Muslim women's movement is predicated on the idea that Muslim men, not Islam, have been responsible for the suppression of women's rights. For this reason, Muslim feminists throughout the world are advocating a return to the society Muhammad originally envisioned for his followers.

The Bible, like the Qur'an, provides a range of moral teachings, many in conflict with one another, that were rooted in the moral beliefs of the time. Some of these teachings would be regarded by most Christians and Jews today as completely unacceptable. Examples include

> "If . . . no proof of the girl's virginity can be found, she shall be brought to the door of her father's house and there the men of her town shall stone her to death." (Deuteronomy 22:20–21)

> "Women should remain silent in the churches. They are not allowed to speak, but must be in submission, as the Law says." (1 Corinthians 14:34)

> "I do not permit a woman to teach or to have authority over a man, but to be in silence." (Timothy 2:12)

From a sociological perspective, it is important to ask not only how such beliefs arose a thousand or more years ago, but also how they are being interpreted today—and how these interpretations find their way into new religious movements and social practices.

# The Global Rise of Religious Nationalism

Religious nationalism involves the linking of deep religious convictions with beliefs about a people's social and political destiny. In countries around the world, religious nationalist movements reject the notion that religion, government, and politics should be separate and instead call for a revival of traditional religious beliefs that are directly embodied in the nation and its leadership (Beyer, 1994). These nationalist movements represent a strong reaction against the impact of technological and economic modernization on local religious beliefs. In particular, religious nationalists oppose what they regard as the destructive aspects of Western influence on local culture and religion, ranging from U.S. television, movies, and social media to the missionary efforts of foreign evangelicals.

Religious nationalist movements accept many aspects of modern life, including modern technology, politics, and economics. They effectively use social media to reach millions of new recruits worldwide. Yet, at the same time, they require a strict interpretation of religious values, rejecting altogether the notion of secularization. Religious nationalist movements do not simply revive ancient religious beliefs. Rather, they partly "invent" the past, drawing on different traditions and reinterpreting events to serve their current beliefs and interests. Violent conflicts between religious groups sometimes result from their differing interpretations of the same historical event (Anderson, 1991; Juergensmeyer, 1993, 2001, 2008; van der Veer, 1994).

**Table 17.1 APPLYING SOCIOLOGY TO RELIGION IN MODERN SOCIETY**

| CONCEPT | APPROACH TO UNDERSTANDING RELIGION IN MODERN SOCIETY | CONTEMPORARY APPLICATION |
|---|---|---|

| CONCEPT | APPROACH TO UNDERSTANDING RELIGION IN MODERN SOCIETY | CONTEMPORARY APPLICATION |
|---|---|---|
| **New religious movements** | A phrase used to characterize new or unusual religious organizations that lack the respectability that comes with being well established for a long period. Preferred by many sociologists of religion over terms such as *cult* or *sect*, which often have negative connotations. | Unification Church, Scientology, Wicca, Eckankar, Druidism, Lucumí (also called Santería), and Rastafarianism |
| **World-affirming movements** | A subcategory of new religious movements that focuses on practices that affirm members' ability to overcome personal limitations and unlock their human potential, and thereby achieve success in the outside world. | Self-help and therapy groups; New Age movements such as paganism, shamanism, and astrology; Scientology |

| CONCEPT | APPROACH TO UNDERSTANDING RELIGION IN MODERN SOCIETY | CONTEMPORARY APPLICATION |
|---|---|---|
| **World-rejecting movements** | A subcategory of new religious movements that is highly critical, and therefore rejecting, of the outside world. These movements tend to be extremely demanding of members, requiring them to subsume their individual identities to that of the group, adhere to strict rules and behaviors, and often withdraw from activity in the outside world. | Branch Davidians; Peoples Temple; Krishna Consciousness; the Manson family; Heaven's Gate |

| CONCEPT | APPROACH TO UNDERSTANDING RELIGION IN MODERN SOCIETY | CONTEMPORARY APPLICATION |
|---|---|---|
| **World-accommodating movements** | A subcategory of new religious movements that are often offshoots of existing religious denominations and that emphasize the importance of an inner religious life and spiritual purity believed to have been lost in traditional religious settings. Adherents accommodate to the outside world, carrying on their lives and careers with little visible change, while practicing inner religious devotion. | Neo-Pentecostalism; Subud (Susila Budhi Dharma); Charismatic Renewal (within Catholicism) |

| CONCEPT | APPROACH TO UNDERSTANDING RELIGION IN MODERN SOCIETY | CONTEMPORARY APPLICATION |
|---|---|---|
| **Religious nationalism** | The linking of strongly held religious convictions with beliefs about a people's social and political destiny, involving a revival of traditional religious beliefs that are directly embodied in the nation and its leadership. Religious nationalists often oppose what they see as the destructive aspects of Western influence on local culture and religion. | Islamic nationalism (Taliban, Islamic State, Boko Haram); Hindu nationalism (Hindutva, Sangh Parivar); Buddhist nationalism (Sinhalese Bodu Bala Sena Buddhist Power Force); Christian nationalism (National Reform Association, Christian Identity movement) |

Religious nationalism is rising because in times of rapid social change, unshakable ideas have strong appeal. The collapse of the Soviet Union, the end of the Cold War, and today's sweeping global economic and political changes have led many nations to reject the secular solutions offered by the United States and its former socialist enemies and to look instead to their own past and cultures (Juergensmeyer, 1995). In the Middle East, for example, many Palestinian Muslims as well as Israeli Orthodox Jews renounce the notion of a secular democratic state, arguing for a religious nation purged of nonbelievers. In India, Hindus, Muslims, and Sikhs face off against one another.

## Islamic Nationalism

Islamic nationalism has triumphed in Iran, Sudan, and Afghanistan. It has also made significant inroads in Algeria, Egypt, Malaysia, Pakistan, Palestine, Turkey, and elsewhere. Since the 1970s, Islamic nationalism

has shaped the contours of both national and international politics. To understand this phenomenon, we must look both to aspects of Islam as a traditional religion and to secular changes affecting countries where its influence is pervasive.

Islam, like Christianity, has continually stimulated activism. The Qur'an is full of instructions to believers to "struggle in the way of God" against both unbelievers and those within the Muslim community who introduce corruption. Over the centuries, there have been successive generations of Muslim reformers, and Islam has become as internally divided as Christianity.

During the Middle Ages, there was a continuous struggle between Christian Europe and the Muslim states. During the height of Islamic power, the *caliphs* (Islamic rulers) ruled over an area extending from what later became Spain, Greece, the former Yugoslavia, Bulgaria, and Romania to India, Pakistan, and Bangladesh. Europeans eventually reclaimed most of these lands, and many Muslim areas in North Africa were colonized by European powers in the eighteenth and nineteenth centuries. These reversals were catastrophic for Islam and Muslim civilization, which Islamic believers held to be the highest and most advanced possible. In the late nineteenth century, the inability of the Muslim world to resist the spread of Western culture led to reform movements seeking to restore Islam to its original purity and strength. A key idea was that Islam should respond to the Western challenge by affirming the identity of its beliefs and practices.

This idea developed in various ways in the twentieth century and underlay Iran's Islamic Revolution of 1978–1979, which was fueled initially by internal opposition to the shah ("the king"), Mohammad Reza Pahlavi (r. 1941–1979). When the shah's premier, Mohammad Mossadeq, nationalized the oil industry in 1951, a conflict ensued between the pro-West shah and the supporters of the nationalistic Mossadeq. The shah eventually fled the country but returned in 1953, when a U.S.- and British-led coup overthrew Mossadeq. The shah tried to promote forms of modernization modeled on the West—for example, land reform, extending the vote to women, and developing secular education. He also used the army and secret police to brutally suppress those who opposed his regime. The fact that he had been installed by Western powers helped fuel nationalist sentiments that eventually led to the revolution that overthrew him. A dominant figure in the revolution was Ayatollah

Ruhollah Khomeini, a religious leader exiled in France during the shah’s reign, who provided a radical reinterpretation of Shiite ideas.

Protesters in Tehran hold up a poster of Ayatollah Ruhollah Khomeini in January 1979. The Islamic Revolution led to the ouster of the shah and the creation of a new Islamic republic under Ayatollah Khomeini.

Khomeini established a government in strict accordance with traditional Islamic law, fusing religion and the state. The government initially made its extremist version of Shiite Islam the basis of all social, political, and economic life in Iran. Men and women were kept rigorously segregated, women had to cover their heads in public, homosexuals could be shot by a firing squad, and women accused of adultery were stoned to death. The strict code reflected a pronounced nationalistic outlook, strongly rejecting Western influences. It should be noted that these practices are not condoned throughout the Muslim world and, in the view of leading Islamic scholars, are contrary to Islamic beliefs (Oakford, 2014).

The aim of the Islamic republic in Iran was to organize government and society so that Islamic teachings would dominate all spheres. The Guardian Council of religious leaders determines whether laws, policies, and candidates for parliament conform to Islamic beliefs, even though Iran has a U.S.-style constitution providing for elected officials and the separation of powers.

Although recent years have seen some hopeful signs that Iran is liberalizing, such hopes have proved to be short-lived in the past. A reform-minded president, Mohammad Khatami, captured control of parliament in the 2000 elections, but Iran's Guardian Council reversed that victory in elections four years later by disqualifying 2,400 liberal candidates (nearly a third of all candidates). Mahmoud Ahmadinejad, a conservative candidate close to Iran's religious leaders, won the presidency in that year, and Iran's relations with Europe and the United States rapidly deteriorated. The pro-democracy Green Movement mobilized millions of people in peaceful protests against the Ahmadinejad government during the 2009 presidential elections but was brutally repressed as a consequence.

The 2013 elections saw a swing in the liberal direction, with the election of Hassan Rouhani as president. Rouhani sought to improve relations with the West, and one of his chief goals was to ease the West's economic sanctions, initially imposed on Iran by the United States in 1979, following the Iranian Revolution. Many other countries joined the United States in imposing sanctions after 2006, when the UN Security Council passed a resolution calling for sanctions in an effort to stop Iran's nuclear enrichment program, seen as a key step in developing nuclear weapons. An agreement to ease sanctions, in exchange for a verifiable cessation of Iran's nuclear weapons program, was reached in July 2015. However, the Trump administration withdrew from the agreement in 2018 and reimposed harsh sanctions on Iran's economy. In 2021, Ebrahim Raisi, a conservative, was elected president of Iran, and further discussions over the agreement have stalled.

## The Spread of Islamic Revivalism

Although the ideas underlying the Iranian Revolution were supposed to unite the whole Islamic world against the West, governments of Sunni-majority countries where Shiites are in a minority have not aligned themselves with the Islamic Revolution in Iran. Yet Islamic fundamentalism (often called "Islamism," the complete adherence to Islamic law along with rejection of most non-Islamic influences) has become popular in most of these states, and various forms of Islamic revivalism elsewhere have been stimulated by it.

Although Islamic fundamentalist movements have grown in many countries in North Africa, the Middle East, and South Asia, they have won power in only two states: Sudan and Afghanistan. Since a 1989 military coup, Sudan has been ruled by Omar al-Bashir, who heads the National Congress Party. The fundamentalist Taliban regime consolidated its hold on the fragmented state of Afghanistan in 1996 but was ousted at the end of 2001 by Afghan opposition forces and the U.S. military. In 2021, the U.S. army withdrew from Afghanistan and the Taliban retook control over the country. Islamist movements also exist in states such as Malaysia, Bangladesh, and Indonesia, and several provinces in Nigeria have implemented sharia courts, which enforce a strict interpretation of Islamic religious law, operating in parallel with civil courts.

Al Qaeda was an early example of a loosely knit transnational network of militant religious fundamentalists with a global vision. Founded by Osama bin Laden, al Qaeda sought to overthrow what it regarded as corrupt Muslim governments, drive Western influence from the Middle East, and eventually establish a religiously based government that would encompass a billion Muslims throughout Europe, Africa, and Asia. Islamic rule would be subject to strict religious discipline, as it currently is in Afghanistan under Taliban rule.

In 2012, a U.S. Navy Seal unit helicoptered into the Pakistan compound where bin Laden had long been hiding, killing bin Laden and raising hopes that al Qaeda would be seriously weakened by the death of its founder. But by then, events in the Middle East had significantly changed the political landscape. The 2003 U.S. invasion of Iraq succeeded in toppling Saddam Hussein, but it also resulted in escalating violence, suicide bombings, and growing sectarian conflict. Some Iraqis mobilized against the U.S. occupation, which lasted until 2011; others were caught up in conflicts between Iraq's Shiite majority and Sunni minority. Tens of thousands of Iraqi civilians died during this period. Sunnis, who had ruled Iraq under Saddam, now found themselves under the control of Shiite governments believed to be aligned with Shiite Iran.

One result was an Islamist revival among fundamentalist Sunnis, who saw the chaos in Iraq and neighboring Syria as providing an opportunity to create an Islamic state. Shiite governments ruled both Iraq and Syria; both countries were wracked by sectarian violence and civil war. Islamist Sunnis called for the creation of a caliphate across a broad swath of Iraq and Syria. This was to be an Islamic state governed by strict religious

principles and ruled over by a caliph, a religious and political successor to the prophet himself. It would enforce—by violent means if necessary—a return to the strict seventh-century religious beliefs attributed to the prophet Muhammad. Following significant military victories over the Iraqi army, the Islamic State of Iraq and Syria (ISIS) proclaimed itself a global caliphate in 2014. (ISIS is sometimes simply referred to as IS—Islamic State—and sometimes referred to as ISIL, Islamic State of Iraq and the Levant. *Levant* is a term that has been used for centuries to refer to the area in the eastern Mediterranean.)

By 2017, however, ISIS had lost much of its territory in Iraq, including control over its key cities, thanks to military efforts by the Iraqi government, supported by the presence of U.S.-led NATO military ground forces and air strikes. In Syria, U.S. and Kurdish forces beat back ISIS to just a few small areas. The defeat of ISIS as a territory-holding state does not, however, necessarily mean its defeat as a potent religious and political force. Rather, its adherents may spread out, becoming a global jihadist movement that seeks control elsewhere or, failing that, continues to engage in acts of terrorism elsewhere in the world (Juergensmeyer, 2016).

Syrians cross the border into Turkey in June 2015, fleeing heavy fighting between ISIS and Kurdish forces.

ISIS was the creation of Abu Bakr al-Baghdadi, who became its founding caliph. Under his rule, unbelievers—Shiites, Christians, and foreigners—were either driven from the caliphate or killed. Beheadings, crucifixions, and mass shootings of civilians were filmed and went viral on social media. ISIS engaged in an expensive, professional, and effective social media campaign to recruit young people worldwide, including young women as potential brides. The group had a strong presence on Facebook and Twitter and posted graphic execution videos on YouTube to disseminate its message and attract new followers to its extremist cause. Muslim religious leaders throughout the world condemned ISIS, whose violent methods are abhorrent to the vast majority of Muslims, who view its teachings as contrary to Islamic beliefs.

Such Islamic revivalism cannot be understood wholly in religious terms. It largely represents a reaction against what Iranian writer Jalal Al Ahmad (1962/1997) called "Weststruckedness" or "Westoxification"—the seductive (and, in his view, corrupting) power of Western cultural beliefs and practices. In countries where as much as half the population is under age 15, where poverty is widespread, and where many well-educated young men and women face a life of marginal employment and uncertainty, such beliefs find fertile ground.

The strong Western presence in the Middle East has provided additional fuel for anti-Western sentiments. In his *fatwas* (opinions that he claimed to be grounded in Islamic law), bin Laden repeatedly condemned U.S. troop presence in Saudi Arabia (which, as the land of Muhammad, is regarded by Islam as its most sacred place), U.S. support for Israel in its conflict with the Palestinians, the first Gulf War against Iraq, and what bin Laden claimed were a million deaths resulting from the postwar economic sanctions against Iraq. Al-Baghdadi called on his followers to "explode the volcanoes of jihad [holy war] everywhere."

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## CONCEPT CHECKS

1. **What are the three largest religious groups in the world?**
2. **What are the reasons so many Americans belong to religious organizations?**
3. **To what extent does the treatment of women reflect social conditions, and to what extent does it derive from holy writings such as the Bible and the Qur'an?**

4. **What is religious nationalism? Why can’t it be viewed as a reaction to economic modernization of local religious beliefs and Westernization?**

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# Glossary

monotheism
: Belief in a single god.

polytheism
: Belief in two or more gods.

civil religion
: A set of religious beliefs through which a society interprets its own history in light of some conception of ultimate reality.

new religious movements
: The broad range of religious and spiritual groups, cults, and sects that have emerged alongside mainstream religions. New religious movements range from spiritual and self-help groups within the New Age movement to exclusive sects such as the Hare Krishnas.

religious movements
: Associations of people who join together to seek to spread a new religion or to promote a new interpretation of an existing religion.

charismatic
: The inspirational quality of leaders that makes them capable of capturing the imagination and devotion of a mass of followers.

world-affirming movements
: Religious movements that seek to enhance followers’ ability to succeed in the outside world by helping them unlock their human potential.

New Age movement
: A general term to describe the diverse spectrum of beliefs and practices oriented on inner spirituality. Paganism, Eastern mysticism, shamanism, alternative forms of healing, and astrology are all examples of New Age activities.

world-rejecting movements
: Religious movements that are exclusive in nature, highly critical of the outside world, and demanding of their members.

total institutions

Groups that exercise control over their members by making them subsume their individual identities in that of the group, compelling them to adhere to strict ethical codes or rules, and sometimes forcing them to withdraw from activity in the outside world.

world-accommodating movements

Religious movements that emphasize the importance of inner religious life and spiritual purity over worldly concerns.

religious nationalism

The linking of strongly held religious convictions with beliefs about a people's social and political destiny.

# 4 UNANSWERED QUESTIONS

**Learn about the sociological debates surrounding trends such as fundamentalism, secularization, and religious violence.**

The resurgence of religion throughout the world has posed some challenges to the sociological study of religion. For much of the early twentieth century, it was widely argued that the rise of science, technology, and the critical thinking associated with modernity would prove a decisive challenge to religious thought, which is based in large part on faith rather than scientifically acceptable standards of evidence. Yet religious beliefs, in all religions, have proven to be remarkably durable. This raises a number of important questions that have yet to be conclusively answered by the sociology of religion.

## Is America Experiencing Secularization or Religious Revival?

According to Philip Hammond (1992), there have been three historical periods in the United States when religion has undergone disestablishment—that is, when the political influence of established religions has been successfully challenged. The first such disestablishment occurred with the 1791 ratification of the Bill of Rights, which calls for the separation of church and state. Some sociologists see this separation as characteristic of the industrial societies of Europe and North America, in which different institutions specialize in different functions—from economics to medicine and from education to politics. Religion is no exception (Chaves, 1993, 1994; Parsons, 1951/1964, 1960).

The second disestablishment occurred between the 1890s and the 1920s, fed by an influx of about 17 million immigrants (mainly European), many of whom were Catholic. The long-standing notion of a predominantly Protestant United States was challenged, and the mainstream Protestant churches never fully regained their influence in politics or in defining national values.

The third disestablishment occurred during the 1960s and 1970s, when the anti–Vietnam War movement, the fight for racial equality, and experimentation with alternative lifestyles eroded core religious beliefs and values. Fundamental challenges arose in areas such as sexuality, family authority, women's rights, and birth control (Glock, 1976; Hammond, 1992; Hunter, 1987; Roof & McKinney, 1990; Wuthnow, 1976, 1978, 1990).

This disestablishment of religion challenged the political influence of religion. Did it also mean that religion was less important to individuals or that secular influences were on the rise? Even during the 1960s and 1970s, when the third disestablishment was at its peak, the religious beliefs of many Americans appeared to be stronger than ever (Roof et al., 1995). For many people, religious beliefs became increasingly private as more people sought spiritual experiences outside established religious organizations (Roof, 1993; Wuthnow, 1998). In fact, the third religious disestablishment arguably contributed to the growing strength of conservative religious denominations, whose adherents reacted strongly to what they perceived as the bankruptcy of liberal theology. Conservative evangelicals effectively helped shape public debate, bringing moral issues such as abortion, sexuality, and lifestyle into political discourse. While liberal theology dominated the mainline churches, conservative theology became increasingly influential in politics (Wuthnow, 1990). Beginning with the Reverend Jerry Falwell's Moral Majority in the 1970s, evangelical groups, especially those with fundamentalist values, have become increasingly involved in the Christian Right in national politics, particularly in the conservative wing of the Republican Party (Kiecolt & Nelson, 1991; Simpson, 1985; Woodrum, 1988). The Christian Right has emerged as a significant force in politics, waging what it views as the "culture wars" between liberalism and traditional religious values.

# How Resurgent Is Evangelicalism?

Evangelicalism, a belief in spiritual rebirth (being "born again"), is a response to growing secularism, religious diversity, and the decline of once-core Protestant values in public life (Wuthnow, 1988, 1990). The late twentieth-century growth in evangelical denominations in the United States appears to have slowed or even declined slightly; while the number

of evangelical Christians has expanded with the U.S. population, it has declined slightly as a percentage of the total population, although mainstream Protestant religious affiliations have experienced more significant declines (Smith, 2021). Some Protestants are seeking the more direct, personal, and emotional religious experience evangelical denominations promise.

Members of the Korean American Presbyterian Church worship together in Queens, New York. Recent years have witnessed the tremendous growth of evangelical denominations in the United States.

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Although some evangelicals combine a modern lifestyle with traditional religious beliefs, others strongly reject many aspects of contemporary life. Fundamentalists are evangelicals who are antimodern, calling for strict codes of morality and conduct. These frequently include taboos against drinking, smoking, and other "worldly evils"; a belief in biblical infallibility; and a strong emphasis on Christ's impending return to earth (Balmer, 1989).

Evangelical organizations have been especially effective at mobilizing resources to achieve their religious and political objectives. They have become extremely competitive "spiritual entrepreneurs" in the "religious marketplace" (Hatch, 1989). Some evangelicals use radio and television

as marketing technologies to reach a wider audience, although the heyday of “televangelists”—preachers with huge television audiences who preached a “gospel of prosperity”—appears to have peaked. Some scholars argue that these ministries are stronger today than ever before (Hadden, 2004). In 2010, the U.S. Bureau of the Census reported that the number of people who self-identify as belonging to denominations that would be classified as evangelical grew from roughly 42 million in 1990 to 45 million in 2001, to 49 million in 2008. The Pew Research Center (2015c) puts the number of evangelical Protestants at around 54 million, or one in five U.S. adults.

The growth of evangelicalism may have peaked in the United States, but it is growing rapidly throughout the world, spurred by evangelical missionary zeal (**Figure 17.1**). In a 2011 survey of nearly 2,200 evangelical leaders throughout the world, only 44 percent of those who lived in the United States, Europe, and other advanced industrial countries expected that the state of evangelical Christianity in their countries would be better in five years than it was; 33 percent expected it to be worse. U.S. evangelical leaders were the most pessimistic, with nearly half (48 percent) expecting things to be worse in five years, compared with only 31 percent who expected things to be better. By way of contrast, those who lived in Africa, the Middle East, Latin America, and parts of Asia were overwhelmingly optimistic about the future: 71 percent expected the state of evangelical Christianity to be better, while only 12 percent expected it to be worse. When asked about the principal threats to evangelical Christianity, 71 percent of the global evangelical leaders—including 92 percent of U.S. leaders—cited the influence of secularism (Pew Research Center, 2011c).

In 2010, 8 out of 10 White evangelical Protestants believed that religion’s influence on U.S. politics and government leaders was declining. Almost all saw this decline as a bad thing—and while fewer than 1 in 5 viewed the Democratic Party as friendly to religion, slightly more than half viewed the Republican Party favorably (Pew Research Center, 2011c). The Tea Party movement, discussed in Chapter 13, represented an effort by political conservatives, many with strong religious roots, to exert influence through a Republican Party that more closely reflected their views. White evangelical Protestants have become a core constituency of the Republican Party, whose program reflects fundamentalist religious beliefs on such topics as opposition to abortion and a reduced role for

government in the economy. As of 2022, White evangelical Protestants identify more with the Republican Party than any other religious group does. Forty-nine percent of White evangelical Protestants identify with the Republican Party, 31 percent identify as independent, and 14 percent identify with the Democratic Party (Jones & Cox, 2017).

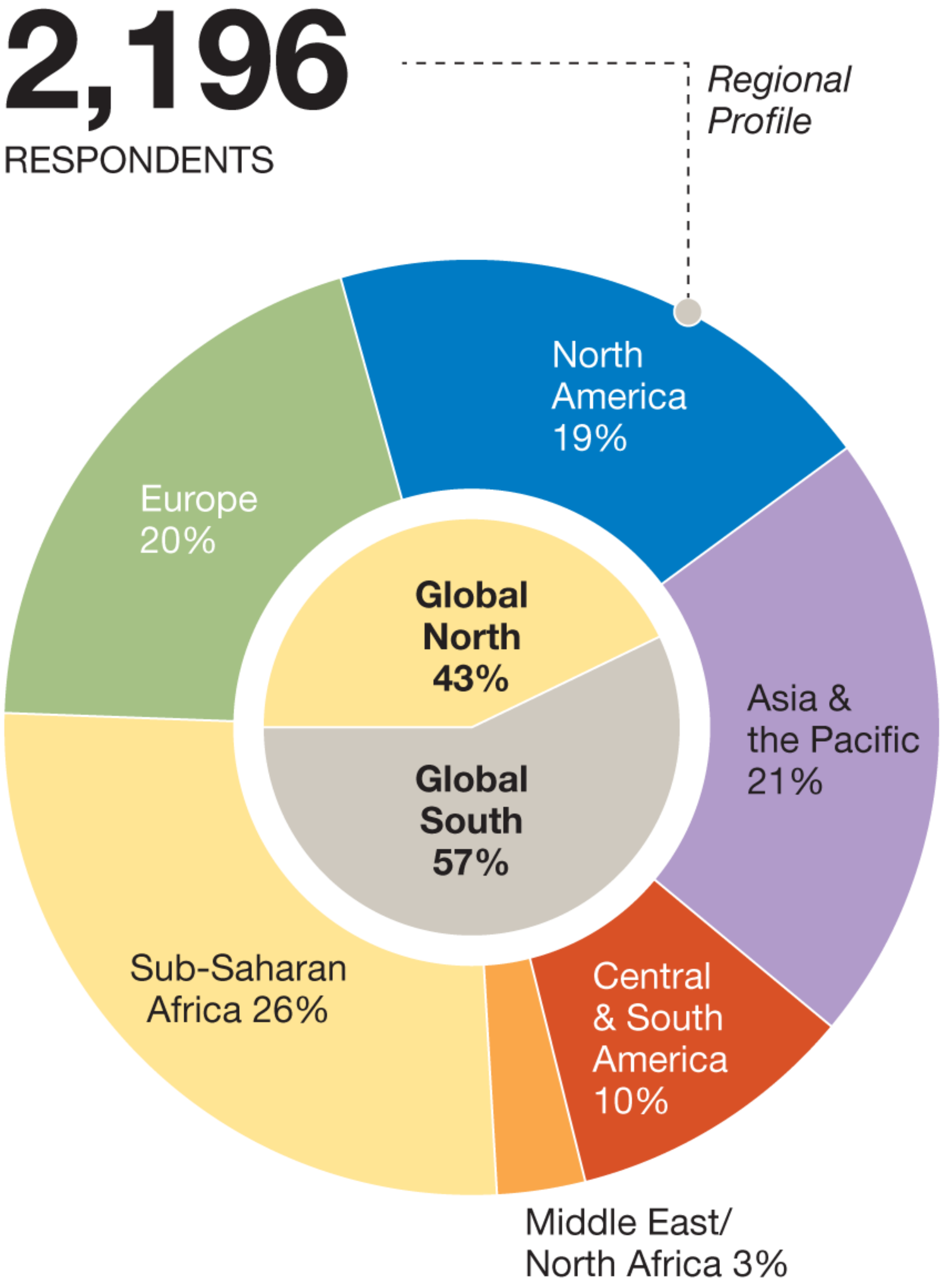
# Is Religious Violence on the Rise?

It is important to remember that before the September 11, 2001, attack on the World Trade Center and the Pentagon by Islamist fanatics associated with Osama bin Laden and al Qaeda, the worst terrorist attack on U.S. soil had occurred at the hands of a Christian fanatic. On April 19, 1995, Timothy McVeigh, a former U.S. Army soldier who believed the United States was dominated by an anti-Christian conspiracy, ignited a truck laden with explosives in front of the Alfred P. Murrah Federal Building in downtown Oklahoma City. The enormous blast killed 168 people, including 19 children under six years old in the building's day-care center. Nearly 700 additional people were injured in the blast, which also damaged hundreds of other nearby buildings. McVeigh, who was later executed for the attack, believed he was waging a "cosmic war" against his version of the unfaithful (Juergensmeyer, 2008).

Figure 17.1

**PROFILE OF EVANGELICAL LEADERS SURVEYED**

*Evangelicalism is fastest growing in the Global South, where the number of evangelicals is now estimated to be greater than in the Global North. North America—the United States and Canada—now accounts for fewer than one out of every five evangelicals in the world.*




Source: Pew Research Center, 2011c.

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Understandably, since 9/11, many Americans have been concerned about the global spread of Islamic violence, a concern that contributes to false stereotypes about a relationship between Islam and violence. The rise of ISIS, suicide bombings, the Islamist attack that claimed 12 lives at the French satirical magazine *Charlie Hebdo* because it had caricatured the

Prophet Muhammad—all these understandably raise the question “How could Islamic religious views—or any religious views—give rise to such a culture of violence?” Sociologist Mark Juergensmeyer (2001, 2008; see also Aslan, 2009) has come to a startling conclusion: Even though all major religious traditions call for compassion and understanding, violence and religion nonetheless go hand in hand. Juergensmeyer, who has studied religious violence among Muslims, Sikhs, Jews, Hindus, Christians, and Buddhists, argues that under the right conditions, ordinary conflicts can become recast as religious “cosmic wars” between good and evil that must be won at all costs. He argues that a violent conflict is most likely to seek religious justification as a cosmic war (1) when the conflict is regarded as decisive for defending one’s basic identity and dignity—for example, when one’s culture is seen as threatened—and (2) when losing the conflict is unthinkable, although (3) winning the conflict is unlikely.

If any of these conditions is present, Juergensmeyer says, it is more likely that a real-world struggle may be perceived in cosmic terms as a sacred war. The occurrence of all three simultaneously strongly suggests it. A struggle that begins on worldly terms may gradually take on the characteristics of a cosmic war as solutions become unlikely and awareness grows of how devastating it would be to lose.

In such instances, the proponents of cosmic warfare justify the loss of innocent lives as serving God’s larger purpose. Juergensmeyer also argues that responding to violence with still greater violence runs the risk of showing the Islamic world that the conflict is indeed cosmic, particularly if the most powerful nations on earth become embroiled. Based on interviews with proponents of terrorism, Juergensmeyer concludes that this is just what al Qaeda wants—to be elevated from the status of a minor criminal terrorist organization to a worthy opponent in a global war against the West. This will increase the appeal of al Qaeda to a wider group of young Islamic men who blame the West for declining Islamic influence and growing hardships many Muslims worldwide face.

To what extent are bin Laden’s views about “Westoxification” shared in the Muslim world? The Pew Research Center (2003) polled 50,000 people worldwide in 2002 and 2003, not long after the 9/11 attacks. Large majorities, including Muslims, reported that such things as television, the internet, and cell phones were making their lives better. (Pakistan, one of the world’s largest Islamic countries, was a notable

exception.) Most people, including most Muslims, felt that foreign TV, movies, and music were a "good thing" (again, except in Pakistan). At the same time, large majorities of Muslims and others also believed that their traditional ways of life were being lost and needed protection against foreign influence.

Although expressing concern that "there are serious threats to Islam today," the vast majority of Muslims reject suicide bombings and other forms of violence against civilians as a legitimate means of "defending Islam against its enemies." Recent surveys have found that most respondents in Muslim-majority countries have unfavorable views of ISIS, including nearly all respondents in Lebanon and 94 percent in Jordan (Lipka, 2017). A 2017 global survey by the Pew Research Center found that ISIS was globally considered the top threat to national security, closely followed by global climate change (Poushter & Manevich, 2017). By 2018, the Global Attitudes Survey found that climate change was considered globally as the top threat to national security, followed by ISIS and cyberattacks (Poushter & Huang, 2019).

Bin Laden's belief that "Westoxification" is a serious problem calling for a violent solution is clearly not widely shared among ordinary Muslims.

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### CONCEPT CHECKS

1. **During what three periods did the United States experience disestablishment? How did disestablishment contribute to the growing strength of conservative religious denominations?**
2. **How do sociologists explain the resurgence of evangelicalism in the United States in the late twentieth century?**

---

# Glossary

disestablishment
: A period during which the political influence of established religions is successfully challenged.

evangelicalism
: A form of Protestantism characterized by a belief in spiritual rebirth (being "born again").

fundamentalists

Evangelicals who are highly antimodern in many of their beliefs and adhere to strict codes of morality and conduct.

# THE BIG PICTURE

# Chapter 17

## Religion in Modern Society

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**Exercises:** Thinking Sociologically

1. Karl Marx, Emile Durkheim, and Max Weber had different viewpoints on the nature of religion and its social significance. Briefly explain the viewpoints of each. Which theorist's views have the most to offer in explaining the rise of national and international fundamentalism today? Why?
2. Drawing on this textbook's discussion, summarize the role of religion for most Americans today and assess whether religion is increasing or decreasing in importance for most people. Explain what it means for people to become more secular or fundamentalist in their religious practices. Are Americans becoming more secular or fundamentalist in their religious observances?

# BASIC CONCEPTS p. 677

## Learning Objectives

Understand how sociologists define and study religion. Learn about the different types of religious organizations: churches and sects, denominations, and cults.

### Terms to Know

secularization • liberation theology • religion • theism • churches • sects • denomination • cults

### Concept Checks

1. What are the three main components of religion as a social institution?
2. How do sociologists differ from other scholars in their approach to studying religion?
3. Describe four types of religious organizations.

## SOCIOLOGICAL THEORIES OF RELIGION p. 683

### Learning Objectives

Understand the sociological approaches to religion developed by Marx, Durkheim, and Weber; the contemporary debate over secularization; and the religious economy approach.

### Terms to Know

alienation • sacred • profane • secular thinking • religious economy

### Concept Checks

1. Why did Karl Marx call religion "the opium of the people'?
2. What are the differences between classical and contemporary approaches to understanding religion?

3. Do the statistics on the growth and decline of religions worldwide provide support for the religious economy approach? Why or why not?

# THE SOCIOLOGY OF RELIGION: CURRENT RESEARCH p. 690

## Learning Objectives

Understand current trends in global religious affiliation and religious affiliation in the United States. Explore the interrelations of gender and religion, as well as the global rise of religious nationalism.

## Terms to Know

monotheism • polytheism • civil religion • new religious movements • religious movements • charismatic • world-affirming movements • New Age movement • world-rejecting movements • total institutions • world-accommodating movements • religious nationalism

## Concept Checks

1. What are the three largest religious groups in the world?
2. What are the reasons so many Americans belong to religious organizations?
3. To what extent does the treatment of women reflect social conditions, and to what extent does it derive from holy writings such as the Bible and the Qur'an?
4. What is religious nationalism? Why can't it be viewed as a reaction to economic modernization of local religious beliefs and Westernization?

# UNANSWERED QUESTIONS p. 715

## Learning Objectives

Learn about the sociological debates surrounding trends such as fundamentalism, secularization, and religious violence.

## Terms to Know

disestablishment • evangelicalism • fundamentalists

## Concept Checks

1. During what three periods did the United States experience disestablishment? How did disestablishment contribute to the growing strength of conservative religious denominations?
2. How do sociologists explain the resurgence of evangelicalism in the United States in the late twentieth century?

# Glossary

secularization
: A process of decline in the influence of religion. Although modern societies have become increasingly secularized, tracing the extent of secularization is a complex matter. Secularization can refer to levels of involvement with religious organizations (such as rates of church attendance), the social and material influence wielded by religious organizations, and the degree to which people hold religious beliefs.

liberation theology
: An activist Catholic religious movement that combines Catholic beliefs with a passion for social justice for the poor.

religion
: A set of beliefs adhered to by the members of a community, incorporating symbols regarded with a sense of awe or wonder together with ritual practices. Religions do not universally involve a belief in supernatural entities.

theism
: A belief in one or more supernatural deities.

churches
: Large bodies of people belonging to an established religious organization. The term is also used to refer to the place in which religious ceremonies are carried out.

sects

Religious movements that break away from orthodoxy.

denomination

A religious sect that has lost its revivalist dynamism and become an institutionalized body, commanding the adherence of significant numbers of people.

cults

Fragmentary religious groupings to which individuals are loosely affiliated but that lack any permanent structure.

alienation

The sense that our own abilities as human beings are taken over by other entities. The term was originally used by Karl Marx to refer to the projection of human powers onto gods. Subsequently, he used the term to refer to the loss of workers' control over the nature and products of their labor.

sacred

That which inspires attitudes of awe or reverence among believers in a given set of religious ideas.

profane

That which belongs to the mundane, everyday world.

secular thinking

Worldly thinking, particularly as seen in the rise of science, technology, and rational thought in general.

religious economy

A theoretical framework within the sociology of religion that argues that religions can be fruitfully understood as organizations in competition with one another for followers.

monotheism

Belief in a single god.

polytheism

Belief in two or more gods.

civil religion

A set of religious beliefs through which a society interprets its own history in light of some conception of ultimate reality.

new religious movements

The broad range of religious and spiritual groups, cults, and sects that have emerged alongside mainstream religions. New religious movements range from spiritual and self-help groups within the New Age movement to exclusive sects such as the Hare Krishnas.

religious movements

Associations of people who join together to seek to spread a new religion or to promote a new interpretation of an existing religion.

charismatic
: The inspirational quality of leaders that makes them capable of capturing the imagination and devotion of a mass of followers.

world-affirming movements
: Religious movements that seek to enhance followers' ability to succeed in the outside world by helping them unlock their human potential.

New Age movement
: A general term to describe the diverse spectrum of beliefs and practices oriented on inner spirituality. Paganism, Eastern mysticism, shamanism, alternative forms of healing, and astrology are all examples of New Age activities.

world-rejecting movements
: Religious movements that are exclusive in nature, highly critical of the outside world, and demanding of their members.

total institutions
: Groups that exercise control over their members by making them subsume their individual identities in that of the group, compelling them to adhere to strict ethical codes or rules, and sometimes forcing them to withdraw from activity in the outside world.

world-accommodating movements
: Religious movements that emphasize the importance of inner religious life and spiritual purity over worldly concerns.

religious nationalism
: The linking of strongly held religious convictions with beliefs about a people's social and political destiny.

disestablishment
: A period during which the political influence of established religions is successfully challenged.

evangelicalism
: A form of Protestantism characterized by a belief in spiritual rebirth (being "born again").

fundamentalists
: Evangelicals who are highly antimodern in many of their beliefs and adhere to strict codes of morality and conduct.

# PART V Social Change in the Modern World

**Throughout much of human history, the pace of social change was slow; most people followed ways of life similar to those of the generations before them. By contrast, today's world is subject to dramatic and continuous transformation. In the remaining chapters, we consider some of the major areas of change.**

**The growing field known as sociology of the body addresses one of the most far-reaching influences of globalization. Chapter 18 examines how global processes affect our bodies, including diet, health, disease, and sexual behavior.**

**In turn, the globalizing of social life both influences and is influenced by changing patterns of urbanization, which is the subject of Chapter 19. This chapter also analyzes the tremendous growth in world population and the increasing threat of environmental problems.**

**The concluding chapter explores some of the major processes of social change from the eighteenth century to the present, offers general interpretations of the nature of social change, and considers where global change is likely to lead us in the twenty-first century.**

# 18 The Sociology of the Body: Health, Illness, and Medicine

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Physical and mental health aspects of our body, such as our body weight, how long we live, and the diseases we suffer from, are

1. **due to our genetic makeup.**
2. **a consequence of our personal choices.**
3. **due to whether we can afford resources such as a healthy diet, a home in a safe neighborhood, and health insurance.**
4. **all of the above.**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

**LEARNING OBJECTIVES**

1. **Basic Concepts** Understand how social, cultural, and historical contexts shape attitudes toward health, illness, and health behaviors.
2. **Theories and Historical Approaches to Understanding Health, Illness, and Health Behaviors** Learn about theoretical perspectives on physical and mental health and illness, and health care in contemporary society, as well as the approaches to studying health and bodies throughout history.
3. **Research on Health, Illness, and Health Behaviors Today** Learn about health patterns in the United States according to social class, gender, and race, and understand the competing explanations for the persistence of these patterns. Understand how society and culture influence health behaviors, including sexual health.
4. **Unanswered Questions** Understand the state of current research on the link between health and income inequality. Learn about complementary and alternative medicine (CAM), gendered patterns of body image concerns, and rising levels of depression and anxiety among young people today.

If you answered *d*, you would be correct. Some of us might have answered *a*, thinking that our bodies and minds are handed down to us through our genes; you might have a friend who says that she gets her slender physique from "her mom's side of the family," while another friend may say that he was "just born big-boned" or "my whole family has slow metabolism." Others might think the answer is *b*—that our physical and mental health reflect our personal choices about what to eat and drink, our willpower in getting up and going to the gym every morning, or the ways that we choose to cope with stress. Students who have taken many sociology courses might think that *c* is correct—that social class, including where we live, the foods we can afford, and whether we have access to a doctor or therapist, affects our health and well-being. Each of these answers is partly correct in that each and every one of these things contributes to our physical and emotional health, leading us to the correct response of *d*.

Aspects of our physical body, including how much we weigh, the diseases we suffer from, and how long we live; our mental health, such as whether we are prone to depression, anxiety, or substance use; and our

health behaviors, like how much we smoke or drink and how easily we can quit these unhealthy habits, reflect a range of social, biological, and economic factors, including our genetic makeup, the activities that fill our day, and even our beliefs about what constitutes a “beautiful” body.

To illustrate this point, let’s think about a social phenomenon that the media refer to as the “obesity epidemic” in the United States. Obesity is a major public health problem facing Americans today. Obesity, or excessive body weight, increases an individual’s risk for a wide range of health problems, including heart disease, diabetes, joint problems, and premature mortality (Haslam & James, 2005; Wang et al., 2011). People with obesity also were at heightened risk of contracting and dying of Covid-19 during the pandemic, due in part to underlying health conditions like weakened immunity that made them especially vulnerable to the virus (Wadman, 2020).

Yet excessive body weight may also take a social and psychological toll. Overweight and obese Americans are more likely than their thinner peers to experience employment discrimination; daily experiences of teasing, insults, and shame; and discrimination by health care providers (Carr & Friedman, 2005). That’s another reason why people with obesity were especially likely to die of Covid-19; some avoided seeking medical treatment as a way to evade stigmatization by health care providers (Wadman, 2020). Explicit discrimination and daily microaggressions against persons with obesity are pervasive and persistent. Negative attitudes toward overweight and obese persons develop as early as elementary school (Puhl & Latner, 2007). In one classic sociological study (Richardson et al., 1961), a sample of 10- and 11-year-old boys and girls were given six images of children and asked to report how much they liked each child. The six drawings included an obese child and children with various physical disabilities and disfigurements. The obese child was ranked dead last—a finding that has been replicated many times in more recent studies (e.g., Latner & Stunkard, 2003; Puhl & Latner, 2007).

Soda and other sugary drinks are blamed for contributing to high rates of obesity, especially among children and teenagers. Currently, 17 percent of children and 21 percent of teens are obese.

---

Part of the reason why overweight and obese Americans are the targets of teasing and discrimination is that a thin ideal prevails today. Simply look at the latest Instagram posts or TikTok videos of your favorite influencer and it will be clear that physical attractiveness is equated with slenderness. Some sociologists have found this is especially the case for White and Asian cisgender women. But this view that slender is the "ideal" has not always been the case. In most premodern societies, the ideal female shape was a fleshy one. Thinness was not desirable, partly because it was associated with poverty, starvation, and illness. Even in Europe in the 1600s and 1700s, the ideal female shape was curvaceous—as evident in paintings by Rubens, for example. The notion of slimness as the desirable feminine shape originated among some middle-class groups in the late nineteenth century, but this Eurocentric ideal became generalized as an ideal for many women only recently.

A historical examination of the physiques of Miss America winners between 1922 and 1999, for example, shows that for much of the twentieth century pageant winners had a body weight that would be

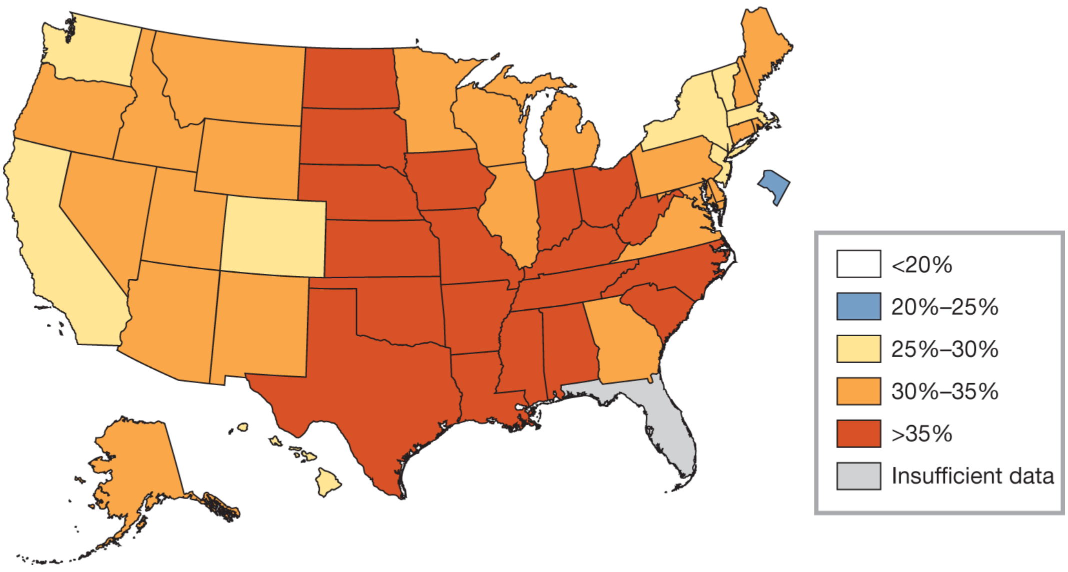
classified as “normal,” yet in recent years the majority of winners would be classified as “underweight” using medical guidelines (Rubinstein & Caballero, 2000). As a result, even young girls who are genetically disposed to a fuller figure may work very hard to fight their biology as they strive to achieve a thin ideal (Haberstick et al., 2010).

Sociological research on the body consistently demonstrates that struggling to comply with a cultural “ideal” of a particular physique is harmful to one’s self-image, mental health, and even physical health. For example, while research shows that African American women are less likely than their White peers to strive for slenderness, the pressure to maintain a curvy “hourglass” figure can heighten their dissatisfaction with their bodies (Lowy et al., 2021). Boys and men also are not immune from such messages; they increasingly struggle to maintain a lean and muscular physique, sometimes turning to unhealthy practices like steroids or extreme dieting (McCabe & Ricciardeli, 2004). As we shall see later in this chapter, some psychiatrists say that rising numbers of young men are prone to “bigorexia,” or a desire to be very muscular, just like their fitness idols on TikTok and YouTube (Hawgood, 2023).

Global Map 18.1

**PERCENTAGE OF U.S. ADULTS CLASSIFIED AS OBESE (BMI > 30), 2021**

While more than 20 percent of adults are obese in all states, the South has the highest prevalence of obesity at 36.3 percent. The West has the lowest prevalence at 28.7 percent.




Source: CDC, 2022g.

Sociologists are fascinated with the puzzle facing our nation today. Negative attitudes toward overweight and obese persons persist, yet at the same time, these individuals currently make up the statistical majority of all Americans. According to the Centers for Disease Control and Prevention (CDC), roughly 70 percent of adults are now overweight (see Global Map 18.1). More than 40 percent of American adults (43 percent of men and 42 percent of women) are currently obese. This proportion varies widely by race; for example, 57 percent of Black women and 44 percent of Hispanic women are now obese, compared with 40 percent of non-Hispanic White women (Stierman et al., 2021).

An even more troubling trend is the increase in the proportion of American children and adolescents who are obese. Between 1976 and 1980, just 6.5 percent of children (ages 6 to 11) and 5 percent of teens (ages 12 to 19) were obese. By contrast, in 2020, 20.7 percent of children and 22 percent of adolescents were obese (CDC, 2022a; Hales et al., 2017). If body weight reflected biology alone, then we would expect that the rates of overweight and obese people would be fairly constant across history—because human physiology has changed little throughout the millennia.

The reasons behind the obesity crisis are widely debated. Some argue that the apparent increase in the overweight and obese population is a statistical artifact. The proportion of the U.S. population who are middle-

aged has increased rapidly since the mid-1980s as the large baby boom cohort has grown older. Middle-aged persons, due to slowing metabolism, are at greater risk of excessive body weight. Others attribute the pattern—especially the childhood obesity increase—to compositional factors and lifestyle. The proportion of children in the United States who are Black or Hispanic is higher today than in earlier decades, and both these ethnic groups are at a much greater risk of becoming overweight than their White peers, a legacy of systemic racism, as we discuss later in the chapter. Children, especially those whose parents can't afford healthy foods and homes in safe neighborhoods, often eat low-cost unhealthy food and sit indoors on the couch playing video games, rather than doing physical activity outdoors (Ogden et al., 2018).

Other researchers counter that the number of Americans who are obese has not risen appreciably. Rather, they argue that the measures used to count and classify obese persons have shifted, resulting in an artificially high number of people classified as obese (Gielen & Sandri, 2013). Finally, some scholars believe that public concern over obesity is blown out of proportion and reflects more of a "moral panic" than a "public health crisis" (Campos et al., 2006; Saguy, 2012). These critics raise important questions about why, how, and for which populations bodies are monitored. Why is body size equated with "morality," or the ways that people should or should not live? In fact, scholars increasingly recognize that judging or shaming larger bodies, even if intended to motivate weight loss, does more harm than good, leading to bullying, weight-based discrimination, misdiagnoses of illness, and even poorer health due to the stress of weight discrimination (Tomiyama et al., 2018).

Most public health experts agree that while obesity is a very real health concern, the solution is not as simple as encouraging people to eat healthy and exercise. Rather, major structural changes are needed. Kelly Brownell calls for changes in the "obesogenic environment"—or those social environments that unwittingly contribute to weight gain. Among adults today, sedentary desk jobs have replaced physical work such as farming. Children are more likely to spend their after-school hours sitting in front of a computer or focusing on their smartphone rather than playing sports or riding bikes around the neighborhood. Parents are pressed for time, given their hectic work and family schedules, and may turn to unhealthy fast food rather than home-cooked meals. Restaurants, eager to lure bargain-seeking patrons, provide enormous serving sizes at

low prices. A Big Mac is less expensive than a healthy salad in most parts of the country (Brownell & Horgen, 2004).

The social forces that promote high fat and sugar consumption and that restrict the opportunity to exercise are particularly acute for poor persons and ethnic minorities. Small grocery stores in poor neighborhoods rarely sell fresh or low-cost produce. Large grocery stores are scarce in low-income urban neighborhoods and rural areas, as well as in predominantly African American neighborhoods (Morland et al., 2002). Given the scarcity of high-quality healthy foods in low-income neighborhoods, scholars have dubbed these areas "food deserts" (Walker et al., 2010). Additionally, high crime rates and high levels of traffic in some urban neighborhoods make exercise in public parks or jogging on city streets potentially dangerous (Brownell & Horgen, 2004).

**Table 18.1 WHAT IS YOUR BODY MASS INDEX?**

People are classified into one of four standard weight categories based on their body mass index (BMI), which reflects their current height and weight. BMI can be calculated using the following formula:

$$\text{BMI} = 703 \times \frac{\text{weight (lb)}}{\text{height}^2\ (\text{in}^2)}$$

| **WEIGHT** | **BODY MASS INDEX CATEGORY (BMI)** |
|---|---|
| Underweight | Less than 18.5 |
| Normal | From 18.5 to 24.9 |
| Overweight | From 25.0 to 29.9 |

| WEIGHT | BODY MASS INDEX CATEGORY (BMI) |
|---|---|
| Obese | 30.0 or higher |

Source: National Heart, Lung, and Blood Institute, 2015.

Policy makers and public health professionals have proposed a broad range of solutions to the obesity crisis. Some have (unsuccessfully) proposed practices that place the burden directly on the individual. For example, some schools have considered having a “weight report card,” where children and parents would be told the child’s body mass index (BMI), in an effort to trigger healthy behaviors at home (Dogloff, 2010) (see Table 18.1). Yet most experts endorse solutions that attack the problem at a more macro level, such as making healthy low-cost produce more widely available; providing safe public places for fitness, free exercise classes, and instruction in health and nutrition to poor children and their families; and requiring restaurants and food manufacturers to note clearly the fat and calorie content of their products (Gortmaker et al., 2011).

Why do many parents turn to fast food to feed their families? What are the consequences?

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Former First Lady Michelle Obama’s Let’s Move! program was held up as an outstanding initiative because it included programs to help children and their families maintain healthy lifestyles (White House, 2014). Let’s Move! provided parents with the tools and information they need to make healthier food choices for their children; for instance, updated daily nutrition guidelines and new food-package labels help point consumers to healthy food choices. In September 2022, the Biden administration held the White House Conference on Hunger, Nutrition, and Health, the first meeting of its kind in more than a decade. The conference specifically recognized that obesity, as well as “the toll of hunger . . . is not distributed equally, disproportionately impacting underserved communities, including communities of color, people living in rural areas, people with disabilities, older adults, LGBTQI+ people, military families, and military veterans” (Office of Disease Prevention and Health Promotion, 2023). Solutions to the obesity crisis require a health equity orientation. Proposed solutions include increasing funds for school lunch and breakfast programs, encouraging school food suppliers to deliver healthy low-fat and low-salt meals to schools, funding inner-city farmers’ markets, and implementing programs to increase children’s fitness levels. Only in attacking the “public issue” of the obesogenic environment will the private trouble of excessive weight be resolved (Brownell & Horgen, 2004).

Taken together, the “obesity epidemic” debate and its proposed solutions illustrate many core themes of sociology. First, they demonstrate the ways in which a “personal trouble,” such as suffering from obesity-related health problems, also reflects “public issues,” such as a social context that prevents poor individuals from buying costly low-fat foods or accessing public parks and other spaces that allow for regular exercise. Second, they reveal that social inequalities based on race, class, and geographic region can shape our bodies. Third, they show that no “single-bullet” explanation can account for major social and public health issues; rather, the source of the problem often encompasses a range of biological, social, economic, and technological factors. In fact, in 2014, the Medical College Admission Test (MCAT) introduced a social-science module, recognizing that future physicians must “consider how income and social

status, education, home and work environments and other factors shape health outcomes" (Tran, 2014).

The study of body weight is just one topic investigated by sociologists specializing in the subfield known as sociology of the body. These scholars investigate how and why our bodies and minds are affected by our social experiences and the norms and values of the groups to which we belong. The ways that social factors affect our health were painfully illustrated when the Covid-19 crisis devastated populations worldwide, with low-wage workers like grocery store clerks and nursing home aides and those living in overcrowded housing particularly vulnerable.

Another central theme in the sweeping field of sociology of the body is the increasing separation of the body from "nature." Our bodies are affected by science and technology in diverse ways, ranging from life-sustaining machines, to the chemicals in our food, to reproductive technologies. Only recently have sociologists recognized the profound interconnections between social life and the body. Therefore, this field is exciting and rapidly evolving. Using these two interrelated frameworks, in this chapter, we analyze the social dimensions of health, illness, and the body in the United States.

# Glossary

obesity
: Excessive body weight, indicated by a body mass index (BMI) over 30.

food deserts
: Geographic areas where residents do not have easy access to high-quality affordable food. These regions are concentrated in rural areas and poor urban neighborhoods.

body mass index (BMI)
: A measure of body fat based on height and weight.

sociology of the body
: A field that focuses on how our health and illness are affected by social and cultural influences.

# 1 BASIC CONCEPTS

**Understand how social, cultural, and historical contexts shape attitudes toward health, illness, and health behaviors.**

Before we can delve into theories describing the social and biological influences on health and illness, it is important that we first identify key terms and concepts.

## Changing Conceptions of Health, Illness, and Medicine

What does it mean to be "healthy"? The simplest and most widely accepted definition is the one provided by the World Health Organization (WHO, 1948): "Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity." In practice, however, cultures differ in what they consider healthy and in what they see as appropriate "treatment" for ill health. All cultures have understood concepts of physical and mental health and illness, but most of what we now recognize as medicine is a consequence of developments in Western society over the past three centuries.

In premodern cultures, the family was the main institution for managing sickness or affliction. There have always been individuals who specialized as healers, using a mixture of physical and magical remedies, and many such traditional systems survive today in non-Western cultures. For instance, Ayurvedic medicine (traditional healing) has been practiced in India for nearly 2,000 years. It is founded on a theory of the equilibrium of psychological and physical facets of the personality, imbalances of which are treated by nutritional and herbal remedies. Chinese folk medicine similarly aims to restore harmony among aspects of the personality and bodily systems and involves the use of herbs and acupuncture for treatment.

Modern medicine sees the origins and treatment of disease as physical and explicable in scientific terms. Indeed, the application of science to

medical diagnosis and cure underlays the development of modern health care systems. Sociologists have argued that in contemporary Western societies, conditions that were previously viewed as having their roots in social, cultural, or religious causes are now “medicalized,” or viewed as biomedical in their roots. Medicalization, according to sociologist Peter Conrad (2007), is the process by which conditions and problems of social life become defined and treated as medical conditions, and thus become the subject of medical study, diagnosis, prevention, or treatment. The medicalization of pregnancy and childbirth, for example, developed slowly as obstetric specialists replaced local physicians and midwives. In industrialized societies, most births today occur in a hospital, with the help of a specialized medical team. Similarly, death was historically considered a normal, natural, and accepted part of life. Most people died peacefully in their own homes. Today, however, “death” is highly medicalized and is viewed as something to be fought or cured. Dying patients often rely on aggressive high-tech care and die in the hospitals where that care is delivered (Carr & Luth, 2019).

Today, depressed people are much more likely to be treated with medication than through other methods. Sociologist Allan Horwitz argues that we have experienced a “loss of sadness” in the United States.

It’s not just physical health conditions that are medicalized; our emotions and mental health also are medicalized. Sociologist Allan Horwitz has argued that in the United States the emotion of “sadness,” a normal response to stressors like loss, failure, and disappointment, has now been transformed into the medical disorder of “depression,” which is believed to have its roots in biological causes such as brain chemistry or genetics (Horwitz & Wakefield, 2007). As such, depressed persons today are much more likely to be treated with medications, such as antidepressants, rather than “talk therapy,” in which a therapist would focus on the social or emotional roots of the sad feelings. Medicalization is tightly linked to the economic organization of medical care. Patients are reimbursed by their health insurers for treatments only when they have a definable medical condition; as Horwitz and Wakefield (2007) note, a physician could not easily find a reimbursable “code” for sadness, but many options are available for a patient presenting at a doctor’s office with “depression” (Moore, 2004).

Other features of modern medicine are the acceptance of the hospital as the setting within which to treat serious illnesses and the development of the medical profession as a body with codes of ethics and significant social power. The scientific view of disease is linked to the requirement that medical training be systematic and long term; self-taught healers are typically excluded. Although professional medical practice is not limited to hospitals, the hospital has provided an environment in which doctors can treat and study large numbers of patients in circumstances permitting the concentration of medical technology.

A tragic clash between spiritual beliefs and modern medicine is the focus of Anne Fadiman's account of an epileptic Hmong girl in *The Spirit Catches You and You Fall Down*.

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On rare occasions, tensions may arise when physicians adhere to modern medical models and their patients adhere to folk or spiritual models of health. These cultural tensions are portrayed poignantly in the classic book *The Spirit Catches You and You Fall Down: A Hmong Child, Her American Doctors, and the Collision of Two Cultures* (Fadiman, 1997).

The book recounts the experience of the Lee family, ethnic Hmong immigrants from Laos, whose infant daughter had epilepsy. The Lees believed their daughter's illness stemmed from spiritual causes, while doctors believed the condition was biological and could be alleviated with anticonvulsive drugs. After trying to comply with a difficult medication regimen, the Lees stopped administering the drugs, and their daughter was placed in foster care, with tragic results.

Just as cultural beliefs about health and illness change across time and place, the very illnesses from which individuals suffer, and the causes and cures of these illnesses, vary widely by sociohistorical context. In medieval times, the major illnesses were infectious diseases such as tuberculosis, cholera, malaria, and bubonic plague. In the fourteenth century, the epidemic of the plague, also referred to as the Black Death, killed a quarter of the population of England and devastated large areas of Europe. Since that time, rates of infectious diseases declined dramatically and were a minor cause of death in industrialized countries, accounting for just 6 percent of deaths annually in the 2010s (Xu et al., 2020). Infectious diseases had given way to noninfectious diseases such as cancer and heart disease as the leading causes of death. However, the assumption that infectious diseases were a thing of the past was challenged in early 2020, when the coronavirus struck China and Italy, and the United States shortly thereafter. As of March 2023, more than 1 million persons in the United States and almost 7 million worldwide had died of the virus (Johns Hopkins University and Medicine, 2023).

Although in premodern societies the highest rates of death were among infants and young children, death rates today (the proportion of the population who die each year) rise with increasing age. The leading causes of death today, heart disease and cancer, disproportionately strike persons aged 65 and older. While infectious diseases can strike anyone today, just as they did during past centuries, older adults are especially vulnerable to coronavirus. Covid-19 was the third-most-common cause of death among older adults in 2020 and 2021. According to estimates from the CDC, roughly 77 percent of all people who died of the Covid-19 virus were aged 65 and over (CDC, 2023a).

When sociologists take a long-term view of health, they find that improvements in medical care accounted for only a minor part of the decline in death rates before the twentieth century. Rather, sweeping social and environmental changes like effective sanitation, better

nutrition, water purification, milk pasteurization, control of sewage, and improved hygiene in the early twentieth century were more consequential (Dowling, 1977). Drugs, advances in surgery, and antibiotics did not significantly decrease death rates until well into the twentieth century. Antibiotics used to treat bacterial infections first became available in the 1930s and 1940s; most immunizations (against diseases such as polio) were developed later. In the late twentieth century, again, major environmental advances improved the health of Americans. Because of the Clean Air Act of 1970, Americans breathe less pollution and face lower risks of health conditions like bronchitis and heart disease, and of premature mortality (U.S. Environmental Protection Agency, 2022). However, with economic and technological development also come new threats to health, a theme we revisit in Chapter 19. For instance, the use of GMOs (genetically modified organisms) and pesticides in food production, the use of petrochemicals that pollute water and air systems, and other "advances" associated with industrialization and efficiency can undermine the health of individuals and the planet (Hsaio, 2015).

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**CONCEPT CHECKS**

1. **Define the term *health*.**
2. **Define and provide an example of medicalization.**
3. **Describe three features of modern medicine.**

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# Glossary

health
: A state of complete physical, mental, and social well-being rather than merely the absence of disease or infirmity.

# 2 THEORIES AND HISTORICAL APPROACHES TO UNDERSTANDING HEALTH, ILLNESS, AND HEALTH BEHAVIORS

**Learn about theoretical perspectives on physical and mental health and illness, and health care in contemporary society, as well as the approaches to studying health and bodies throughout history.**

To best understand the issues of health and illness in contemporary society, it is essential that we step back and look at both the history of these topics and the changing theoretical approaches to understanding them.

## Colonialism and the Spread of Disease

The types of illnesses from which individuals suffer, the treatments available for these conditions, and the very ways we think about "causes" of illness have changed dramatically throughout human history. The hunting and gathering communities of the Americas, before the arrival of the Europeans, were not as susceptible to infectious disease as the European societies of the period. Many infectious organisms thrive only when human populations live above the density level that is characteristic of hunting and gathering life. The highest population density among hunter-gatherer communities was 22 people per square mile among the Chumash people; to put this in perspective, in 2023 there were 93 people per square mile in the United States overall, and more than 27,000 in New York City (Erlandson et al., 2001; World Population Review, 2023d). Permanently settled communities, particularly large cities, risk the contamination of water supplies by waste products. Hunters and

gatherers were less vulnerable in this respect because they moved continuously across the countryside.

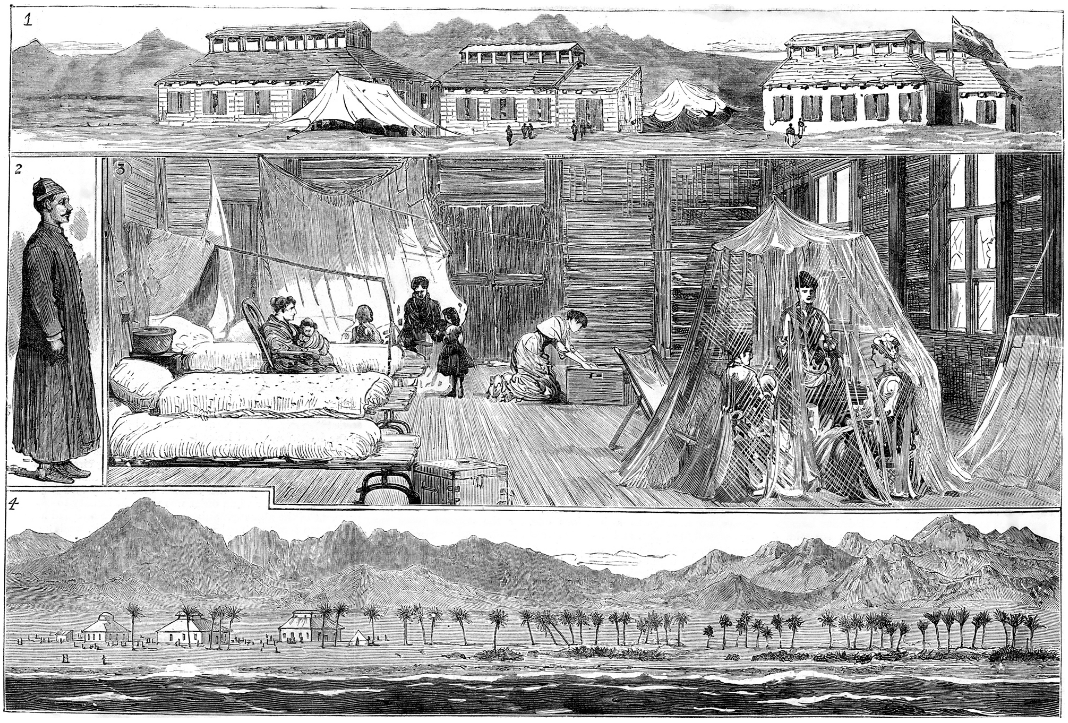
During the colonial era, efforts to bring Western ideals to developing societies also brought certain diseases into other parts of the world. Smallpox, measles, and typhus, among other major maladies, were unknown to the Indigenous populations of Central and South America before the Spanish conquest in the early sixteenth century. English and French colonists brought the same diseases to North America (Dubos, 1959). Some of these illnesses produced epidemics that ravaged or completely wiped out Indigenous populations, which had little or no resistance to them.

In Africa and subtropical parts of Asia, infectious diseases have been rife for a long time. Tropical and subtropical conditions are especially conducive to diseases such as malaria, carried by mosquitoes, and sleeping sickness, carried by the tsetse fly. Historians believe that risk from infectious diseases was lower in Africa and Asia before Europeans tried to colonize these regions, since colonists often brought with them practices that negatively affected the health of local natives. The threat of epidemics, drought, or natural disaster always loomed, but colonialism led to major unforeseen changes in the relation between populations and their environments, producing harmful effects on health patterns. The Europeans introduced new farming methods, upsetting the ecology of whole regions. For example, before the Europeans' arrival, Africans successfully maintained large herds of cattle in East Africa. Changes introduced by the intruders allowed for the multiplication and uncontrolled spread of the tsetse fly, which carries illnesses that are fatal to both humans and livestock. Today, large areas of East Africa are completely devoid of cattle (Kjekshus, 1977).

The most significant consequence of the colonial system was its effect on nutrition and, therefore, on levels of resistance to illness as a result of the changed economic conditions involved in producing for world markets. In many parts of Africa, the nutritional quality of native diets became substantially depressed as cash crop production supplanted the production of native foods.

This was not a one-way process, however. Early colonialism also changed Western diets, having a paradoxical impact in terms of health. On the one hand, Western diets benefited from the addition of new foods,

such as bananas, pineapples, and grapefruit. On the other hand, the importation of tobacco, together with raw sugar (which found uses in all manner of foods), has had harmful consequences. Thus, the diseases from which we suffer are shaped by not only human biology but also complex macrosocial influences such as globalization, colonialism, and the development of technologies that foster the growth of particular crops. Contemporary scholars further caution that the health impacts of colonialism are not merely a thing of the past but powerful forces that continue to shape global health today. The legacies of colonialism, like racism and the financial and environmental exploitation of low-income nations, continue to shape health inequalities worldwide in the twenty-first century (Richardson, 2020).



Infectious diseases were introduced to entirely new populations during the era of colonialism. In this 1884 engraving, European ship passengers are held at a smallpox quarantine camp in Egypt to prevent the spread of the disease. At the same time, they try to keep malaria at bay with mosquito netting.

# Sociological Theories of Health and Illness

One of contemporary sociologists' main concerns is the experience of physical and mental disease or illness—how individuals experience being sick, chronically ill, or disabled and how these experiences are shaped by social interactions with others. If you have ever been ill, even for a short period, you know that patterns of daily life are temporarily modified and your interactions with others change. This is because the normal functioning of the body is a vital, but often taken for granted, part of our daily lives. Our sense of self is predicated on the expectation that our bodies will facilitate, not impede, our social interactions and daily activities.

Illness has both personal and public dimensions. When we become ill, not only do we experience pain, discomfort, confusion, and challenges carrying out our daily activities, but others are affected as well. In the case of infectious diseases like Covid-19, we can infect other people with whom we live, work, and interact. When we suffer from other conditions, our friends, families, and coworkers may extend sympathy, care, support, and assistance with practical tasks. They may struggle to understand our illness or to adjust the patterns of their own lives to accommodate it. Many try to make sense of the illness or figure out the cause of the health problem. Those we encounter react to our illness; their reactions, in turn, shape our own interpretations and can pose challenges to our sense of self. For instance, a longtime smoker who develops lung disease may be made to feel guilt or shame by family members.

Two sociological perspectives on the experience of illness have been particularly influential. The first perspective, associated with the functionalist school, proposes that "being sick" is a social role, just as "worker" or "parent" is a social role. As such, unhealthy persons are expected to comply with a widely agreed-upon set of behavioral expectations. The second perspective, favored by symbolic interactionists, explores how the meanings of illness are socially constructed and how these meanings influence people's behavior (see Table 18.2).

## Functionalist Perspectives: Sick Role Theory

The functionalist theorist Talcott Parsons (1951) developed the notion of the sick role to describe patterns of behavior that the sick person adopts to minimize the disruptive impact of illness. Functionalist thought holds

that society usually operates in a smooth and consensual manner. Illness is, therefore, seen as a dysfunction that can disrupt the flow of this normal state. A sick individual, for example, might be unable to fulfill standard responsibilities or might be less reliable and efficient than usual. Because sick people cannot carry out their normal roles, the lives of people around them are disrupted: Assignments at work go unfinished and cause stress for coworkers, responsibilities at home are not fulfilled, and so forth.

According to Parsons, people learn the sick role through socialization and enact it, with the cooperation of others, when they fall ill. As with other social roles, such as gender roles, sick persons face societal expectations for how to behave; at the same time, other members of society abide by a generally agreed-upon set of expectations for how they will treat the sick individual. The sick role is distinguished by three sets of normative expectations:

1. The sick person is not held personally responsible for their poor health. Illness is seen as the result of physical causes beyond the individual's control.
2. The sick person is entitled to certain rights and privileges, including a release from normal responsibilities. Since the sick person bears no responsibility for the illness, they are exempted from certain duties, roles, and behaviors. For example, a sick adult might be released from normal household duties; a sick child, excused from attending school. Behavior that is not as polite or thoughtful as usual or an unkempt appearance might be excused. The sick person gains the right to stay in bed, for example, or to take time off from work. A person with mental illness who allegedly commits a crime may be found "not guilty by reason of insanity."
3. The sick person is expected to take sensible steps to regain their health, such as consulting a medical expert and agreeing to become a patient. To occupy the sick role, the sick person must have their claim of illness corroborated by a medical professional, who legitimates the claim. Such confirmation allows those surrounding the sick person to accept the validity of their claims. Without such confirmation, the sick person may be viewed as a malingerer, or one who feigns health problems to avoid one's obligations. A sick person who refuses to consult a doctor or who does not heed the advice of a medical authority puts their sick role status in jeopardy.

> To revisit an earlier example, a mentally ill person on trial for committing a crime may be ordered by the court to take psychotropic medications to treat their symptoms.

Over the past seven decades, sociologists have refined Parsons's sick role theory. They argue that the experience of the sick role varies with the type of illness, since people's reactions to a sick person vary according to the severity of the illness and their perception of its nature and cause. Thus, not all people will uniformly experience the rights and privileges that accompany the sick role. Eliot Freidson (1970) identified three versions of the sick role that correspond with different types of illness. The *conditional* sick role applies to individuals suffering from a temporary condition that ultimately will be cured. The sick person is expected to get well and receives some rights and privileges according to the severity of the illness. For example, someone with a serious and potentially life-threatening condition like coronavirus would reap more benefits than someone with a common cold.

The *unconditionally legitimate* sick role refers to individuals who are suffering from incurable or terminal illnesses. Because the sick person cannot do anything to get well, they are automatically entitled to occupy the sick role. The expectation that one will seek timely medical care may be relaxed, because care seeking may be futile for some health conditions. The unconditionally legitimate role might apply to individuals with alopecia (total hair loss) or severe acne (in both cases, there are no special privileges but rather an acknowledgment that the individual is not responsible for the illness), or with cancer or Parkinson's disease, which results in important privileges and the right to abandon many duties.

The third sick role is the *illegitimate* role, which applies when an individual suffers from a disease or condition that is stigmatized by others. In such cases, there is a sense that the individual might be partially responsible for their illness; additional rights and privileges are not necessarily granted. HIV/AIDS is perhaps the most vivid example of a historically stigmatized illness that affects a sufferer's perceived right to assume the sick role. Some HIV/AIDS patients may be held "responsible" for their condition and may be judged negatively for having engaged in high-risk behaviors such as unprotected sex or the use of unclean needles. Pediatric AIDS patients, those who contracted AIDS through a tainted blood transfusion, or other persons perceived to be "innocent" victims, by contrast, may be spared stigmatization. More

recently, Covid patients who had refused to receive vaccines, or who did not vigilantly follow masking requirements, have been maligned as responsible for their condition (Bardosh et al., 2022).

**Critiques of Sick Role Theory** Although the sick-role model reveals how the ill person is an integral part of a larger social context, a number of criticisms can be leveled against it. Some argue that the sick role formula does not adequately capture the *lived experience* of illness. Others point out that it cannot be applied across all contexts, cultures, and historical periods. For example, it does not account for instances when doctors and patients disagree about a diagnosis or have opposing interests. It also fails to explain illnesses that do not necessarily lead to a suspension of normal activity, such as alcoholism, certain disabilities, and some chronic diseases. Furthermore, adopting the sick role is not always a straightforward process. Some individuals who suffer for years from chronic pain or from misdiagnosed symptoms are denied the sick role until they get a clear diagnosis. Other sick people, such as young adults with autoimmune diseases, often appear physically healthy despite constant physical pain and exhaustion; because of their "healthy" outward appearance, they may not be readily granted sick role status.

In other cases, social factors such as race, class, and gender can affect whether and how readily the sick role is granted. For instance, during the pandemic, about 11 percent of workers said they went to work with Covid symptoms or after being exposed to someone with the virus because they could not afford to take time off work. However, this rate was nearly three times higher (29 percent) among low-income workers (Kaiser Family Foundation, 2022). The sick role cannot be divorced from the social, cultural, and economic influences that surround it.

The realities of life and illness are more complex than the sick role suggests. Sick role theory is less useful for understanding chronic illness (versus infectious disease) because there is no single formula for chronically ill or disabled people to follow. People who have an injury or illness that strikes late in life may struggle to adjust to their new role, whereas for those who have had a disability their entire life, their condition is simply another part of their identity—and is not necessarily seen by the person as "sickness" (Molton & Yorkston, 2017). Moreover, chronically ill persons often find that their symptoms fluctuate, so that they feel and appear healthy on some days, yet experience debilitating

symptoms on other days. Living with illness is experienced and interpreted in multiple ways.

## Symbolic Interactionist Approaches: Illness as "Lived Experience"

Symbolic interactionists study the ways people interpret the social world and the meanings they ascribe to it. Many sociologists have applied this approach to health and illness and view this perspective as a partial corrective to the limitations of functionalist approaches to health. Symbolic interactionists are not concerned with identifying risk factors for specific illnesses. Rather, they address questions about the personal experience of illness: How do people react and adjust to news about a serious illness? How does illness shape individuals' daily lives? How does living with a chronic illness affect an individual's self-identity?

One theme that sociologists address is how chronically ill individuals cope with the practical and emotional implications of their illness. Certain illnesses require regular treatments or maintenance that can affect daily routines. Undergoing dialysis, injecting insulin, or taking large numbers of pills requires individuals to adjust their schedules. Some illnesses have unpredictable effects, such as violent nausea or sudden loss of bowel or bladder control. Other illnesses (or the treatments for those illnesses) can alter physical appearance; for instance, chemotherapy for cancer may trigger hair loss, while the hormonal changes that accompany polycystic ovary syndrome (PCOS) may cause women to have excessive facial and body hair and male-pattern baldness. People suffering from chronic conditions often develop strategies for managing their illness in daily life. These include practical considerations—such as noting the location of the restrooms when in an unfamiliar place—as well as skills for managing interpersonal relations, both intimate and commonplace. Although symptoms can be embarrassing and disruptive, people develop coping strategies to live as normally as possible (Kelly, 1992).

Symbolic interactionists are interested in how illnesses shape individuals’ daily lives. For example, people with diabetes must constantly monitor their blood sugar levels.

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At the same time, the experience of illness can pose challenges to and changes in people’s sense of self. These develop not only through the reactions of other people but also through the ill person’s perception of

those reactions. For chronically ill or disabled persons, routine social interactions become tinged with risk or uncertainty, and interpretations of common situations may differ substantially. An ill person may need assistance but may not want to appear dependent, for example. A healthy individual may feel sympathy for someone diagnosed with an illness but might be unsure whether to address the subject directly. The changed context of social interactions can precipitate transformations in self-identity.

Some sociologists have investigated how individuals with chronic physical or mental illness manage their symptoms and treatments within the overall context of their lives (Jobling, 1988; Williams, 1993). Illness can place enormous demands on people's time, energy, strength, and emotional reserves. Serious illness can also tax the emotional resources of loved ones. Juliet Corbin and Anselm Strauss (1985) identified three types of "work" incorporated into the everyday strategies of the chronically ill. *Illness work* refers to activities involved in managing the condition, such as taking medications, doing diagnostic tests, or undergoing physical therapy. *Everyday work* pertains to the management of daily life, such as maintaining relationships with others, running household affairs, and pursuing professional or personal interests. *Biographical work* involves the process of incorporating the illness into one's life, making sense of it, and developing ways of explaining it to others. Such a process can help people with mental and physical illness restore meaning and order to their lives.

Each of these processes of adaptation may be particularly difficult for those who suffer from a stigmatized health condition, such as extreme obesity, alcoholism, schizophrenia, HIV/AIDS, or lung cancer. Sociologist Erving Goffman (1963) developed the concept of stigma, which refers to any personal characteristic that is devalued in a particular social context. Stigmas typically come in one of three forms: "abominations of the body" (such as disfigurement, disability, or obesity), "tribal stigma of race, nation, or religion" (such as belonging to a historically denigrated racial or ethnic group), and "blemishes of individual character" (such as laziness, lack of personal control, or immorality). Stigmatized individuals and groups often are treated with suspicion, hostility, or discrimination.

**Table 18.2APPLYING SOCIOLOGY TO THE BODY**

| CONCEPT | APPROACH TO UNDERSTANDING BODIES | CONTEMPORARY APPLICATION |
|---|---|---|
| Functionalist perspectives argue that society operates in a smooth and consensual manner. Illness is, therefore, seen as a dysfunction that can disrupt the flow of this normal state. | Sick role theory describes how sick persons work to minimize the disruptive impact of illness on institutions like work and family. | When an employee takes a sick day from work, they are expected to stay home and focus on healing, to facilitate their return to work. |
| Symbolic interactionists study the ways people interpret the social world and the meanings they ascribe to it. | Symbolic interactionists focus on meaning-making and everyday experiences of health, like how living with a chronic illness affects one's identity, behavior, and interactions with others. | A person who is diagnosed with a health condition like autoimmune disease may consider that a major part of their identity, talk about it regularly, join Facebook support groups, and adjust their daily activities accordingly. |

| CONCEPT | APPROACH TO UNDERSTANDING BODIES | CONTEMPORARY APPLICATION |
|---|---|---|
| Stigma theory holds that some personal traits are devalued in a particular social context and elicit unkind or discriminatory treatment from others. | Visible physical health conditions may be stigmatized because they are visually unappealing to others, while other conditions are stigmatized because others incorrectly view them as indicative of a character flaw. | Medical and public health experts emphasize that substance use disorders like opioid addiction are diseases rather than matters of choice or personal character, to fight the stigmatization of persons with such conditions. |

Some ill persons, particularly those marked by “abominations of the body,” may arouse feelings of sympathy or compassion, especially if they are not held responsible for their illness. They may even receive special privileges. For example, one study showed that adolescents offered much less critical appraisals of overweight persons when they believed that the weight was caused by a thyroid problem, and thus was due to a biological factor rather than to a character flaw such as laziness or lack of self-control (Dejong, 1993). Studies are less conclusive regarding mental illness; some find that diagnosing mental illness as a “brain disease” (and thus beyond one’s control) diminishes the stigma, whereas others show that attributing mental illness to genetic factors does not minimize society’s negative views (e.g., Corrigan & Watson, 2004; Phelan, 2005).

By contrast, when a health condition is viewed as indicative of a “character blemish,” such as sexual promiscuity or gluttony, the healthy population may reject the sufferers. Similarly, throughout history, many infectious diseases, especially those contracted by the poor, were often stigmatized and viewed as indicators of shame and dishonor. This occurred in the Middle Ages with leprosy, when people were isolated in leper colonies. HIV/AIDS often provokes such stigmatization today—even though, as with leprosy, the risk of contracting the disease in

ordinary situations is almost nonexistent. The Joint United Nations Programme on HIV/AIDS (UNAIDS, 2003) reports incidences in Kerala, India, when children infected with HIV have been barred from schools and denied any interaction with other children.

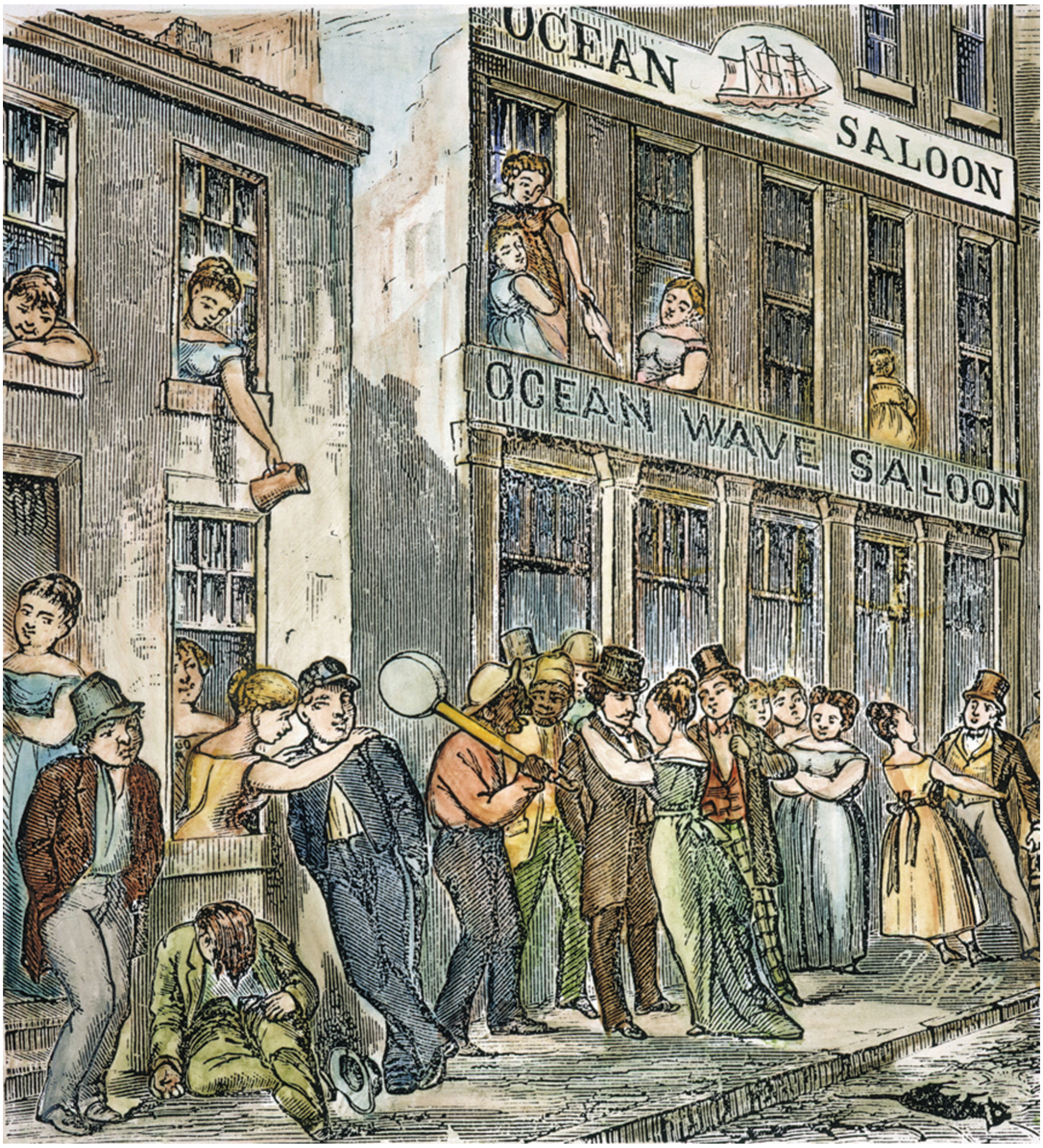
Stigmas are, however, rarely based on valid understandings or scientific data. They spring from stereotypes or perceptions that may be false or only partially correct. Further, the nature of a stigma varies widely across sociocultural contexts: The extent to which a trait is devalued depends on the values and beliefs of those who do the stigmatizing. For instance, in the United States, obese persons are much more likely to be stigmatized by White upper-middle-class persons than they are to be stigmatized by African Americans or working-class Whites (Carr & Friedman, 2005). By contrast, other health conditions, including major mental illness and HIV/AIDS (as we will read about later in this chapter), are much more widely stigmatized. One recent study of 16 countries, including the United States and nations in Europe, Africa, and Asia, found that even in the most liberal, tolerant countries, the majority of the public had stigmatizing attitudes toward people with schizophrenia and were willing to exclude them from close, personal relationships and positions of authority, seeing them as unpredictable and potentially dangerous (Pescosolido et al., 2013).

However, individuals with stigmatized health conditions and their family members do not uniformly accept and can even challenge pervasive beliefs regarding stigma. First, persons with stigmatized medical conditions, such as mental illness, can resist the stigma. This means that they may reject the stereotypical claims made about them and may actively distance themselves from such claims (i.e., “that’s not me”) (Thoits, 2011). This capacity to distance oneself from and even challenge negative stereotypes is linked with having a more positive self-concept. Second, family members and significant others of persons with stigmatized health conditions also may resist or reject the potentially harmful stereotypes. Goffman (1963) noted that individuals who are close with these persons and understand their condition are “wise.” They may hold insights into the life of the stigmatized person, which has made them “wise” to their situation and sympathetic toward them. As such, they are essentially allies who can help resist or fight back against stereotypical beliefs and stigmatizing actions.

# The History of Research on Sexual Behaviors and Sexual Health in Western Cultures

Today, social scientists recognize that consensual, pleasurable sexual relationships are an important contributor to physical and emotional health (Ford et al., 2019). The “sex positive” messages that guide some researchers today stand in stark contrast with early perspectives that cast a narrow and largely critical light on sexual behavior. Western attitudes toward sexual behavior were for nearly 2,000 years molded primarily by Christianity, whose dominant view was that all sexual behavior is suspect except that needed for reproduction. During some periods, this view produced an extreme prudishness, but at other times, many people ignored the church’s teachings and engaged in practices such as adultery. The idea that sexual fulfillment can and should be sought through intimate relations was rare.

In the nineteenth century, religious presumptions about sexuality were partly replaced by medical ones. Most early writings by doctors about sexual behavior, however, were as stern as the views of the church. Some argued that any type of sexual activity unconnected with reproduction would cause serious physical harm. Masturbation was said to cause blindness, insanity, heart disease, and other ailments, while oral sex was claimed to cause cancer.



Sexual hypocrisy abounded in the Victorian era. Virtuous women were said to be indifferent to sexuality, while it was acceptable for their husbands to visit prostitutes or keep mistresses. This 1878 illustration of the St. Louis red-light district shows that prostitution was openly tolerated.

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In Victorian times, sexual hypocrisy abounded. Many Victorian men—who appeared to be sober, well-behaved citizens, devoted to their wives—regularly visited sex workers or kept mistresses. Such behavior was accepted, whereas “respectable” women who took lovers were regarded as scandalous and were shunned in polite society. Virtuous women were believed to be indifferent to sexuality, accepting their husbands’ advances only as a duty. The differing attitudes toward the sexual activities of men and women formed a double standard, which persists today.

Attitudes toward sexual behavior have become much more permissive over the past century, although some people, particularly those influenced by Christian teachings, believe that premarital sex is wrong. Some frown on all forms of sexual behavior except heterosexual activity within marriage. However, some behaviors remain consistently more acceptable than others. For example, the proportion of Americans saying that premarital sex is "always wrong" dropped from 34 percent in 1972 to 20 percent in 2016. By contrast, disapproval of extramarital sex has remained consistently high and even increased during that same period. The proportion of Americans saying that extramarital sex is "always wrong" increased from 69 percent to 75 percent between 1973 and 2016 (Smith et al., 1972–2016).

## Early Research on Sexual Behavior: Kinsey's Study

Much of what we know about human sexuality in contemporary society comes from the pathbreaking (although controversial) research of pioneering scientist Alfred Kinsey. Kinsey's research in the United States, in the 1940s and 1950s, was the first major scientific investigation of sexual behavior. Kinsey and his collaborators (1948, 1953) faced condemnation from religious organizations, and his work was denounced in the newspapers and in Congress as immoral. But he persisted, producing the largest rigorous study of sexuality at that time, although his sample was not representative of the overall American population.

Dr. Kinsey's (center) pathbreaking research into sexual behavior in the 1940s and 1950s revealed a large discrepancy between publicly accepted attitudes and actual sexual conduct.

Kinsey's results were surprising because they revealed a tremendous discrepancy between the narrow beliefs about sexual behavior that prevailed at that time and actual sexual conduct taking place. He found that almost 70 percent of men in his study had visited a sex worker and 84 percent had had premarital sexual experience. Yet, following the double standard, 40 percent of men expected their wives to be virgins at the time of marriage. More than 90 percent of men had engaged in masturbation and nearly 60 percent in oral sexual activity—activities that were frowned upon (and never discussed publicly) at that time. Among women, about 50 percent had had premarital sexual experiences, although mostly with the man whom they eventually married. Some 60 percent had masturbated, and the same percentage had engaged in oral-genital contact.

The gap between publicly accepted attitudes and actual behavior was probably especially pronounced just after World War II, the time of Kinsey's study. A phase of sexual liberalization had begun in the 1920s,

when many younger people felt freed from the strict moral codes that had governed earlier generations. Sexual behavior probably changed, but issues concerning sexuality were not openly discussed. People participating in sexual activities that were still strongly disapproved of on a public level concealed them, not realizing that others were engaging in similar practices behind closed doors. The more permissive 1960s brought openly declared attitudes more into line with the realities of behavior. Yet the more things change, the more they stay the same. Even in the twenty-first century, some sexual behaviors continue to be judged harshly as "not normal," and some individuals continue to face stigmatization and discrimination due to their sexual behavior and preferences. For instance, people who have nonmonogamous relationships, including open marriages, and those who partake in practices like bondage, discipline, dominance, submission, masochism, and sadism (BDSM) or other forms of "kink" behavior fear disclosing their behavior to others for fear of stigmatization (Ling et al., 2022).

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**CONCEPT CHECKS**

1. **Describe how the primary causes of death have changed between colonial times and the present day.**
2. **How do functionalist theorists and symbolic interactionists differ in their perspectives on health and illness?**
3. **Describe several changes in sexual behavior over the past two centuries.**
4. **What are the most important contributions of Alfred Kinsey's research on sexuality?**

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# Glossary

sick role
: A term used by the functionalist Talcott Parsons to describe the patterns of behavior that a sick person adopts to minimize the disruptive impact of their illness on others.

stigma
: Any physical or social characteristic that is labeled by society as undesirable.

# 3 RESEARCH ON HEALTH, ILLNESS, AND HEALTH BEHAVIORS TODAY

**Learn about health patterns in the United States according to social class, gender, and race, and understand the competing explanations for the persistence of these patterns. Understand how society and culture influence health behaviors, including sexual health.**

Life expectancy for people in most parts of the world increased steadily throughout the nineteenth, twentieth, and early twenty-first centuries. Infectious diseases such as polio, scarlet fever, and diphtheria have been largely eradicated. In wealthy and industrialized nations, infant mortality rates dropped precipitously, leading to an increase in the average age of death. Compared with other parts of the world, standards of physical health and well-being are high in most wealthy nations. These advances in public health have been attributed in part to the power of modern medicine. It is commonly assumed that medical research and technological developments have been, and will continue to be, successful in uncovering the biological causes of disease and developing effective treatments.

At the same time, however, the proportion reporting mental health conditions, including depression and anxiety disorders, has increased steeply through the twentieth and twenty-first centuries, raising new questions about how we define, detect, and diagnose mental health conditions (Greenberg, 2010; Horwitz, 2013). These increases have been particularly steep among teens and young adults in the 2020s (a topic we revisit later in this chapter), a consequence of persistent and myriad social stressors including the pandemic, social isolation, increased political polarization, intensifying awareness of the injustices of racial and gender oppression, worries about gun violence, and dimming hopes for a stable financial future (Richtel, 2022).

When we take a long view of history, it is encouraging that people are living longer, healthier lives than in past centuries. Yet upon closer

inspection, we see an increasingly bifurcated picture today, where those who have enjoyed social advantages are living longer than ever, while communities facing economic disadvantage and racial oppression are doing worse. In fact, life expectancy has declined considerably since 2014 in the United States, with these dips starting years prior to the pandemic. These average declines in life span have been driven largely by significant drops among populations facing social and economic adversity. Understanding the magnitude and causes of health disparities is a priority for sociologists.

Health disparities are inequalities in health, health care, and health behaviors across different racial, ethnic, and socioeconomic groups. One of the most telling indicators of the level of social inequality in a society is disparity in life expectancy. From 2015 to 2017, the United States witnessed three consecutive years of declining life expectancy, a stunning development after a half century of improvements in life expectancy. These dips intensified in the pandemic years, with life expectancy declining by 1.5 years between 2019 and 2020, to the lowest level since 2003 (Arias et al., 2021). The drop in life expectancy in 2020 was the largest one-year decline since World War II.

A close look at the data shows that the overall shortening of life spans prior to the pandemic was a function of health conditions that were and continue to be particularly devastating to economically disadvantaged adults, most notably middle-aged high school dropouts who had high rates of "deaths of despair," including suicides and deaths related to opioid addiction (Case & Deaton, 2020). Declines in life span during the pandemic era also reveal stark disparities in deaths from Covid-19. Covid-19 deaths, like deaths of despair, disproportionately strike economically disadvantaged persons who live in crowded housing and work in jobs that place them at risk, like bus drivers or grocery store clerks. One examination of New York City found that the Bronx—the borough with the highest proportion of racial and ethnic minorities, the most persons living in poverty, and the lowest levels of educational attainment—had higher rates of hospitalization and death related to Covid-19 than all other boroughs (Wadhera et al., 2020). National data show that age-adjusted death rates from Covid-19 are about twice as high among Blacks, Hispanics, and Native Americans than among Whites and Asians (Ndugga et al., 2022).

Understanding the distribution and incidence of disease and illness within a population is the primary goal of the field of social epidemiology —the science that studies the distribution and incidence of disease and illness within the population. Social epidemiologists attempt to explain the link between physical and mental health and variables such as social class, gender, race, age, and geography. While most scholars acknowledge the strong positive correlation between socioeconomic resources and good health, they do not agree about the nature of the connection or how to address health inequalities. One of the main areas of debate involves the relative importance of individual variables (e.g., lifestyle, behavior, diet, stress, and cultural patterns) versus environmental or structural factors (e.g., systemic racism, income distribution, poverty, and access to health care).

In this section, we examine cutting-edge research on health patterns in the United States according to social class, gender, and race, and we review some competing explanations for the persistence of those patterns. We also discuss current research on sexual health. Although social scientists historically have focused on the social problems associated with human sexuality, like sexually transmitted disease or unwanted pregnancy, contemporary research also emphasizes the positive consequences of healthy consensual sexual relationships for emotional and physical well-being (McKinney, 1987; Mitchell et al., 2021). We conclude by highlighting the ways our bodies—something we think of as "natural"—are increasingly shaped and affected by a further aspect of the macrosocial context: science and technology.

# Social Patterning of Health and Illness in the United States

One of the most enduring patterns social epidemiologists have documented is the persistence of health inequalities, where members of those social groups with more status, prestige, power, and economic resources typically enjoy better physical and mental health. Although we see some exceptions to this rule—for example, women currently live longer than men in the United States, despite persistent earnings differences between the two groups—the social class and Black-White gaps have endured, and even widened, over the last several decades. We

now provide evidence of these patterns and offer explanations for why they persist.

## Social Class–Based Inequalities in Health

In Chapter 8, we defined *social class* as a concept that encompasses education, income, occupation, and assets. In U.S. society, people with more education, higher incomes, and more prestigious occupations have better health. What is fascinating is that each of these dimensions of social class may be related to health and mortality for different reasons.

Income is the most obvious dimension. In countries such as the United States, where medical care is expensive and many people have historically lacked insurance, those with the richest financial resources have better access to physicians and medicine. But inequalities in health also persist in countries that have national health insurance, such as Great Britain. The landmark *Black Report* revealed that social inequalities in health and mortality in the United Kingdom had not diminished since the implementation of the National Health Service (NHS) but had instead increased (Townsend & Davidson, 1982). Yet part of this growing gap was due to improvements in mortality among the wealthier classes and not due to declines among the lower socioeconomic groups. This suggested that the upper classes were making greater (or somehow "better") use of the improved access to medical resources. Thus, we must think beyond income and consider the other dimensions of social class: occupational status and education.

Differences in occupational status may lead to inequalities in health and illness even when medical care is fairly evenly distributed. A classic study of health inequalities in Great Britain (Townsend & Davidson, 1982) found that manual workers had substantially higher mortality rates than professional workers, even though Britain's health service had made great strides in equalizing the distribution of health care. Indeed, different occupations are associated with different levels of health risks. Those who work in offices or domestic settings have less risk of injury or exposure to hazardous materials. Jobs can be dangerous in one of two ways: conditions that increase one's risk of on-the-job accidents, and continuous exposure to dangerous or stressful conditions that eventually hasten one's death.

Type 2 diabetes is a chronic condition that typically develops in adults and disproportionately affects the poor and minority groups.

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According to the U.S. Bureau of Labor Statistics (BLS, 2021), 9 of the 10 most “fatal” jobs in 2021 due to occupational injuries were manual labor jobs: logger; fishermen and hunters; roofer; aircraft pilots and flight engineers; iron and steel worker; driver/sales worker and truck driver; refuse and recyclable material collector; underground mining machine operators; helpers in construction trades; and electrical power-line installers and repairers. Public-service jobs such as police officer, firefighter, and military personnel also place their workers at heightened risk of accidental or sudden death. Some jobs are hazardous because they expose their workers to dangerous conditions over time, ultimately leading to disease and death. Other work settings are hazardous because they expose their employees to infectious diseases. Workers in long-term care settings like nursing homes were particularly susceptible to Covid-19 because their work placed them in confined spaces with older adults suffering from the disease. Nursing home workers need to move from room to room to assist patients and serve them meals, heightening their own risk (Yourish et al., 2020). In general, industrial-based disease is difficult to calculate because it is hard to determine whether an illness is acquired from working conditions or from other sources. However, some work-related diseases are well documented: Lung disease is widespread

in mining, as a result of dust inhalation; work with asbestos has been shown to produce certain types of cancer (U.S. BLS, 2012).

Education is also a powerful predictor of health: Those with higher levels of education have longer life spans than persons with fewer years of schooling. In recent years, persons with the lowest levels of education—especially women—have experienced a considerable decrease in life expectancy, while all other groups have experienced gains (Case & Deaton, 2020). Not only do high school dropouts die younger than persons with higher levels of education, but they also have experienced an absolute decline in life expectancy, or the number of years they live, since the 1990s (Olshansky et al., 2012). A recent study found that life expectancy increased for college-educated people and declined for persons without a four-year college degree. Closer inspection of these differences found that rates of "deaths of despair" from suicide and drug abuse are particularly high among those with less education (Case & Deaton, 2020; Sasson & Hayward, 2019).

What accounts for the steep educational gradient in life span today? Numerous studies find a positive correlation between education and a broad array of preventive health behaviors. Better-educated people are significantly more likely to engage in aerobic exercise and to know their blood pressure (Shea et al., 1991) and less likely to smoke (Kenkel et al., 2006) or be overweight (Himes, 1999). By contrast, persons who have not had the advantage of advanced education engage in more cigarette smoking; they also have more problems with cholesterol and body weight (Winkleby et al., 1992). People with low levels of education also are less likely to have health insurance and are more likely to misuse and even overdose on prescription medications (Tavernise, 2012). More highly educated people also respond differently to health threats. One study of smokers found that after suffering a heart attack, highly educated persons were much more likely than poorly educated persons to quit smoking (Wray et al., 1998). Lest we jump to the conclusion that persons with less education make "bad choices," sociologists have acknowledged that safe places to exercise, grocery stores with healthy foods, and other heath-enhancing amenities are more common in higher-income neighborhoods (Altschuler et al., 2004).

Mental health is similarly affected by social class–based inequalities. In general, persons with lower levels of education and income fare worse in terms of most mental health outcomes, including risk of depression,

anxiety, and suicidal ideation. The stressors related to economic adversity, including unsatisfying jobs, strained marriages, earlier onset of physical health problems, and worries about money and one's personal safety, may overwhelm one's ability to cope. The Covid-19 crisis was a case in point; stay-at-home orders, rampant business shutdowns, and job loss are stressful for everyone but are most overwhelming for low-income persons who live paycheck to paycheck and don't have ample savings to sustain them during periods of layoff or furlough. Depressive symptoms (feelings of profound sadness and hopelessness) and anxiety (nervousness about one's daily experiences) are emotional consequences of living under persistently stressful circumstances (Carr, 2014).

Most social epidemiologists view education as the most important of the three dimensions of socioeconomic status in predicting health. This is because education is associated with a broad range of personal and situational factors that promote positive health behaviors, including high levels of perceived control over one's environment (Mirowsky & Ross, 2005) and health literacy, which refers to one's capacity to obtain, process, critically evaluate, and understand the basic health information and services needed to make appropriate health decisions (Zarcadoolas et al., 2006). Understanding one's health risks and having the means to do something about them are core components of the health-belief model (Becker, 1974; Rosenstock, 1974), which provides a framework for understanding why some individuals participate in positive health behaviors while others do not. The model proposes that individuals' decisions to engage in positive health behaviors (or to change their health behaviors) are based on their evaluation of the possible threat a health condition poses and the perceived benefits of, and barriers to, taking action to prevent getting the health condition.

The Covid-19 pandemic made clear the importance of health literacy, which also encompasses the capacity to differentiate between legitimate scientific information and potentially harmful misinformation. That's a further reason why Covid death rates were higher among persons with lower levels of education. One of the most powerful predictors of vaccine hesitancy, defined as an unwillingness to receive the vaccine, was low educational attainment. Adults with lower levels of education were least likely to get vaccinated, despite overwhelming scientific evidence that vaccinations reduced the chances of getting sick, and of being hospitalized or dying from the virus (Bulusu et al., 2023). The top

reasons vaccine-hesitant people gave for eschewing this preventive measure were lack of trust in the vaccines (55 percent), worries about side effects (48 percent), and low trust in the government (46 percent) (Law et al., 2022). Vaccine-hesitant people also had high levels of exposure to vaccine-related misinformation shared via Twitter (Pierri et al., 2022). Others could not readily access important information, even if they wanted to, due to lack of internet connectivity, limited ability to understand public health campaigns, or limited awareness of how to access vaccines (Hudson & Montelpare, 2021). This research powerfully shows how access to legitimate information, the capacity to critically evaluate this information and one's personal risk, and the ability to develop a strategy to minimize risk are clearly shaped by social-structural factors.

## Race-Based Inequalities in Health

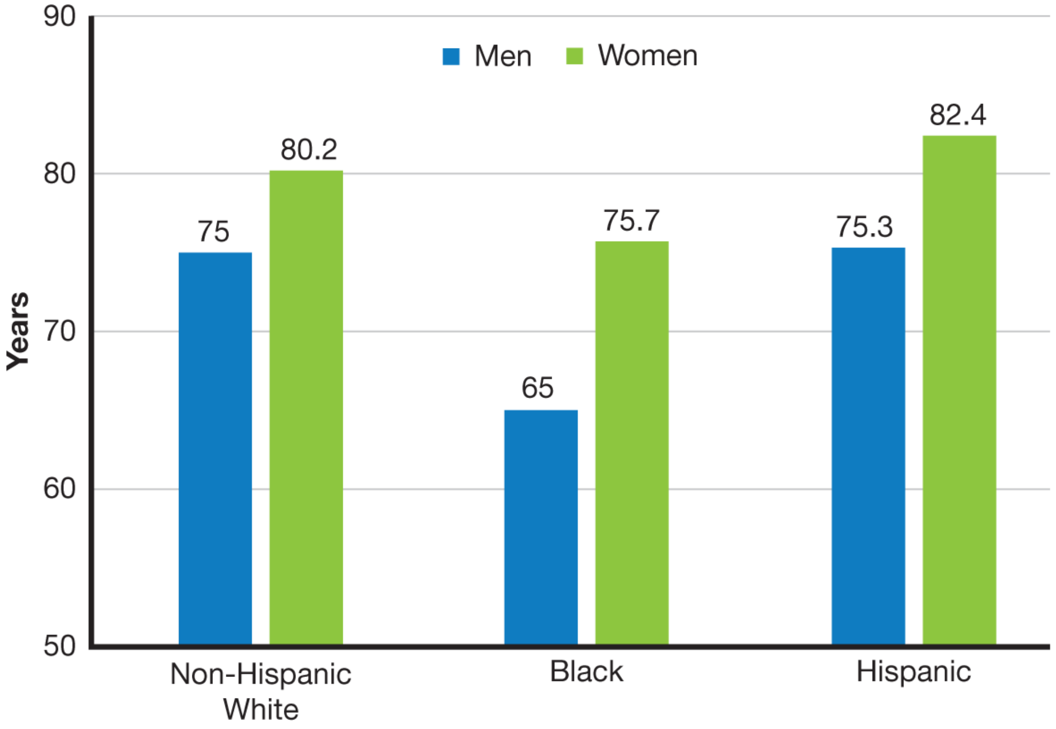
Black Americans fare worse than Whites in the United States on nearly all physical health indicators, ranging from body weight to mortality rates to risk of major illnesses like diabetes, asthma, hypertension, and cancer. Life expectancy at birth in 2020 was about 80 years for White females but just 75.7 years for Black females. Likewise, life expectancy at birth in 2020 was about 75 years for White males yet just 68 years for Black males (Arias et al., 2021; Figure 18.1). Hispanics fare best with respect to life expectancy, a pattern referred to as the Hispanic or Latino paradox; in 2020, life expectancy at birth was about 75 for Hispanic men and 82 for Hispanic women.

Life expectancy at birth is defined as the average number of years a newborn infant would live if prevailing patterns of mortality at the time of their birth were to stay the same throughout their life. This snapshot statistic is generally thought of as the average number of years a person lives. One of the most powerful influences on a population's life expectancy is its infant mortality rate. If a population has a high number of deaths among infants and children, these high youthful death rates reduce life expectancy. Part of the reason why the Black life expectancy disadvantage is so profound is that Black infants have mortality rates twice that of White or Hispanic babies. Roughly 11 Black infants per every 1,000 born in 2020 died in their first year of life, compared to about 9 deaths per 1,000 among Native American and Native Hawaiian

infants, and less than 5 deaths per 1,000 for White, Hispanic, and Asian infants (CDC, 2022f).

Figure 18.1

**LIFE EXPECTANCY AT BIRTH BY RACE/ETHNICITY, 2020**




Source: Arias et al., 2021.

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Racial differences in health reveal the far-reaching consequences of interpersonal and structural aspects of racism, a topic introduced in Chapter 11. Centuries of racist policies and practices in the United States have affected health directly and indirectly. Legal practices like redlining, segregation in schools and housing, and unequal access to higher education and high-quality jobs affect one's risk of disease, and access to health-enhancing goods and services. Daily experiences with discrimination take a toll on one's body, with mounting research demonstrating the physiological impacts of exposure to racial discrimination and microaggressions (Goosby et al., 2018).

A closer inspection of Blacks' health and mortality disadvantage further reveals the multiple pathways through which systemic racism matters for health. One important reason for Blacks' health disadvantage is that

Blacks as a group have less money than Whites. The median wealth of White households is roughly 13 times that of Black households and 6 times that of Hispanic households (Bennett et al., 2022). And in 2021, the median income of a Black man was 28 percent less than that of a White man (U.S. Department of Labor, 2022). In 2019, the median wealth of Black and Hispanic households was $14,100 and $31,700, respectively. Meanwhile, the median wealth of White families was $187,300 (Bennett et al., 2022). Yet the differences in Black and White health go beyond economic causes and reflect other important aspects of the social and cultural landscape. Consider racial gaps in mortality. The rise in violent crime in the late 1980s accompanied the rise of widespread crack cocaine addiction, mainly affecting poor African American neighborhoods that were plagued by high levels of unemployment (Wilson, 1996). Homicide victimization rates for all races have declined considerably over the past 20 years, yet the stark racial gap persists: The murder rate for young Black males is 10 times higher than for their White peers (Widra, 2019), and young Black men are about 3 times as likely as their White counterparts to be killed by police violence today (Schwartz & Jahn, 2020).

Other race-based inequalities in health status, health behaviors, and health care are also stark. There is a higher prevalence of hypertension among Blacks—a difference that may be partly biological and partly related to factors like exposure to stress, as well as lack of access to healthy low-salt, low-fat foods. Blacks also are more likely than Whites to contract and die from Covid-19. There are many reasons why, including the jobs they work in, greater use of public transit, less access to health care, higher rates of underlying health conditions, higher rates of living in crowded housing with extended family members, and higher rates of living in institutions like prisons where infection rates are very high (CDC, 2020a).

Despite the persistence of Black-White disparities in health and health behaviors, some progress has been made in eradicating them. According to the CDC (2023b), racial differences in cigarette smoking have decreased. In 1965, half of White men and 60 percent of Black men aged 18 and over smoked cigarettes. By 2020, 17.3 percent of White men and 20.9 percent of Black men smoked. In 1965, roughly equal proportions of Black and White women aged 18 and older smoked (33 and 34 percent, respectively). This equivalence was preserved in 2020, with 13.5 percent

of Black women and 16 percent of White women smoking (CDC, 2023b). Latino and Asian adults, by contrast, have dramatically lower rates than their Black and White counterparts; in 2020, just 12 percent of Asian American men and 2.6 percent of Asian American women were smokers, with comparable rates of 13.1 percent and 7.1 percent for Hispanic men and women, respectively.

Hypertension among Blacks also has been greatly reduced, yet rates remain high. In the early 1970s, half of Black adults between the ages of 20 and 74 suffered from hypertension. During 2015–2016, roughly 40 percent of Black adults, compared to 28 percent of White adults, suffered from hypertension (Fryar et al., 2017). Despite the overall decline, this rate is still high and may reflect the currently high and rising rates of obesity among Black women. Eighty-two percent of Black women are considered overweight or obese, as compared to almost 64 percent of White women (CDC, 2017). Black women also are far less likely than White women to exercise regularly, a pattern that most social scientists attribute to their hectic schedules of juggling work and family and the high costs of fitness programs and gym memberships (August & Sorkin, 2010). However, in 2011, then-U.S. surgeon general Regina M. Benjamin drew attention and some criticism by suggesting that Black women avoid exercise because it may ruin their hair; Black women often spend considerable time and money on treatments such as hair relaxers (Versey, 2014). A recent study by the University of Ohio found that while many clinicians engage Black women in conversations regarding exercise and weight, only about 25 percent ever discuss practical implications of hair maintenance. The study highlighted hair maintenance as a barrier to regular exercise (Tolliver et al., 2019).

Patterns of physician visitation, hospitalization, and preventive medicine also have improved, yet racial equity remains elusive. Race differences in breast cancer deaths provide a disheartening illustration. Although Black and White women have similar rates of breast cancer, Black women are 19 percent more likely to die of the disease (Monticciolo et al., 2018). The main explanation is that Black women often have their cancer detected at a later and more difficult-to-treat and dangerous stage of disease progression. Tumors in more advanced stages increase one's mortality risk and impede the effectiveness of potential treatments (Smith-Bindman et al., 2006). However, there is some hope that Black women's risk will decline as rates of mammography increase. In fact, in

2019 a higher proportion of Black women (71 percent) than White women (69 percent) had had a mammogram within the past two years (CDC, 2021d).

The extensive body of research on Black-White health disparities underscores the role of systemic racism. However, this literature raises a puzzle regarding the Hispanic paradox, introduced earlier in this chapter. Hispanics in the United States, like Blacks, have fewer socioeconomic resources than Whites, on average, but their health—and especially the health of their infants—is just as good as, if not better than, that of Whites. Some experts attribute Hispanics' health advantage to cultural factors such as familism, or the tendency of communities and families to provide care for one another, including support for pregnant women (Campos et al., 2008). Another important explanation is more methodological in nature. Studies of Hispanic health in the United States focus on those Hispanics who successfully migrated to the United States; as such, they are believed to be in better health, or more robust, than those who remained in their native countries (Perea, 2012). In other words, these migrants to the United States are not "typical" of all Hispanics and may be especially healthy.

Racial differences in mental health are far less well understood than are racial differences in physical health. Until recently, most studies have shown that Blacks report fewer symptoms of depression than do Whites, and once socioeconomic factors are controlled for, Blacks actually report lower rates of depression than Whites (Dunlop et al., 2003). While studies indicate that the prevalence of depression among Blacks was 10.4 percent as compared to 17.9 percent among Whites, Blacks experienced chronic depression at a much higher rate than Whites (56 percent versus 38.6 percent, respectively). While Blacks may have lower rates of depression then Whites (partially due to religious and community support as well as strong racial identity), they are often underdiagnosed or misdiagnosed (Bailey et al., 2019; Oates & Goode, 2013).

In sum, racial differences in physical health have narrowed yet persisted over time, while differences in mental health can be explained by a range of psychosocial factors, underscoring the complex ways that biological, social, and economic factors shape health.

## Gender-Based Inequalities in Health

Women in the United States generally live longer than men—a relatively recent phenomenon. In the United States, there was only a two-year difference in female and male life expectancies in 1900. By 1940, this gap had increased to 4.4 years; by 1970, to 7.7 years. Today, the gender gap in life expectancy is just under 5 years; women's life expectancy at birth is now 81 years, while men can expect to live 76 years (Arias et al., 2021).

The main reason for the gender gap in life expectancy is that the leading causes of death have changed since the turn of the century—and the main causes of death today disproportionately strike men. In 1900, the leading cause of death was infectious disease, which struck men, women, and children equally. However, chronic diseases like heart disease and cancer, which are the leading causes of death today, also disproportionately strike men. These conditions are heavily influenced by lifestyle, diet, and behavior—all of which are shaped by the distinctive experiences of women and men in contemporary society. Men also are more likely than women to die of Covid-19, a pattern attributed to social factors like the kinds of jobs men work in, as well as their lower rates of adherence to masking and social-distancing policies (Danielsen et al., 2022).

Social explanations for women's mortality advantage focus on behavioral differences between men and women. Men historically have been socialized to equate risk with masculinity (Mahalik et al., 2007). Men are more likely than women to smoke cigarettes. Likewise, higher proportions of men drink alcoholic beverages, binge-drink, and smoke marijuana (CDC, 2017). However, in recent years, female high school dropouts have experienced a decrease in life expectancy, due to poor health behaviors such as smoking, drinking, and prescription drug misuse (Olshansky et al., 2012). As a result, the gender gap in life expectancy has narrowed for those with the least education, yet this change is due to declines in women's health rather than improvement in men's.

Most sociological studies of gender gaps and health focus on social factors, although some disparities have a clear biological basis. For example, the World Health Organization finds that newborn girls are more likely than newborn boys to survive to their first birthday. This inherent biological advantage continues through life, and women are expected to live six to eight years more than men in many regions of the world (WHO, 2020a). Disentangling the effects of biology from social context is very difficult, however, given that gender shapes one's social

experiences from the moment of birth (see Chapter 10). One study from the 1950s used an innovative design in its attempts to identify the distinctive effects of biology versus social environment on mortality risk. The researchers focused on a subpopulation of men and women who were believed to have identical lifestyles, diets, and levels of stress: nuns and monks (Madigan, 1957). The nuns lived longer than the monks, and both had life expectancies essentially the same as that for the rest of the population. Because the living environments were equalized for the two groups, lifestyle elements such as diet, drinking, and stress could be ruled out as explanatory factors (Madigan, 1957). However, critics noted that the monks smoked more than the nuns did, so the study did not entirely account for lifestyle differences. Further, the study could not account for the gender-related lifestyle factors that existed before persons entered the religious order.

Numerous studies spanning the fields of biology and epidemiology provide suggestive evidence that women have a biological advantage. Recent studies suggest that estrogen helps protect women against heart disease by reducing circulatory levels of harmful cholesterol, whereas testosterone increases low-density lipoprotein. Women also have stronger immune systems, in part because testosterone causes immunosuppression (Ness & Kuller, 1999). Emerging evidence also suggests that women with Covid-19 have a higher level of antibodies than men, which are a protective factor (Gupta, 2020).

Biologists have also cited genetic factors. Humans have 23 pairs of chromosomes, one of which determines sex. Males have XY sex chromosomes, while females have two X chromosomes. The X chromosome carries more genetic information than the Y, including some defects that can lead to physical abnormalities. Instead of making females more vulnerable to X-linked disorders, this seems to give females a genetic advantage. A female typically needs two defective X chromosomes for most genetically linked disorders to manifest themselves; otherwise, one healthy X chromosome can override the abnormal one. A male who has a defective X chromosome will have a genetically linked disease because there is no other X chromosome to cancel it out. This fact may account for the higher numbers of miscarriages of male fetuses, male infant deaths, and deaths at all ages due to congenital abnormalities and weaker cardiopulmonary systems (Hayflick, 1994; Hill & Upchurch, 1995). However, biology alone cannot

explain gender difference in mortality, especially because this relationship differs substantially over time and across nations.

One of the apparent ironies of health research is that women have an advantage in mortality, yet they appear to fare worse than men on nearly every indicator of self-reported health problems on surveys. For instance, women report higher rates of illness from acute conditions and nonfatal chronic conditions, including arthritis, osteoporosis, and depressive and anxiety disorders. Women are slightly more likely than men to report their health as fair to poor (Zajacova et al., 2017). They are more likely than men to be limited in mobility activities from age 50 on and in daily tasks from age 70 on (Bloomberg et al., 2021). In addition, they make more physician visits each year than men and undergo twice the number of surgical procedures as men do (National Center for Health Statistics [NCHS], 2008). Women also are twice as likely as men to report symptoms of depression and to be diagnosed with a major depressive disorder (Salk et al., 2017).

One of the explanations for women's mortality advantage is that women engage in more preventive care.

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What would explain this paradox, that men die younger but women report more health problems? Sociologists offer two main explanations: (1) Advancing age brings poorer health, and women are older than men

on average due to their greater life expectancy and (2) women make greater use of medical services, including preventive care, and thus are more cognizant of their health symptoms (NCHS, 2008). Men may experience as many, or more, health symptoms as women, but they may ignore their symptoms, underestimate the extent of their illness, or utilize preventive services less often (Waldron, 1986). Further, men who are socialized to believe that men should be "traditionally masculine," strong, and self-sufficient are less likely to seek out annual checkups (Springer & Mouzon, 2011).

Explanations for the gender gap in depression are less clear, yet scholars typically attribute women's greater level of depression to measurement issues and differences in stress exposure. First, standard instruments used to measure depression typically emphasize symptoms that are more likely to be endorsed by women, as these symptoms are more closely linked to stereotypical female behavior such as "I felt sad" or "I cried a lot" (Stommel et al., 1993). Men are less likely to endorse such items, leading some scholars to question whether depression in men goes underdetected. Men are less likely to report their depressive symptoms—whether on a survey or to a health care provider—yet they have suicide rates that are three to four times higher than women's (Garnett et al., 2022). Thus, it is difficult to conclude that men have better mental health than women. Rather, their mental health problems take a different form.

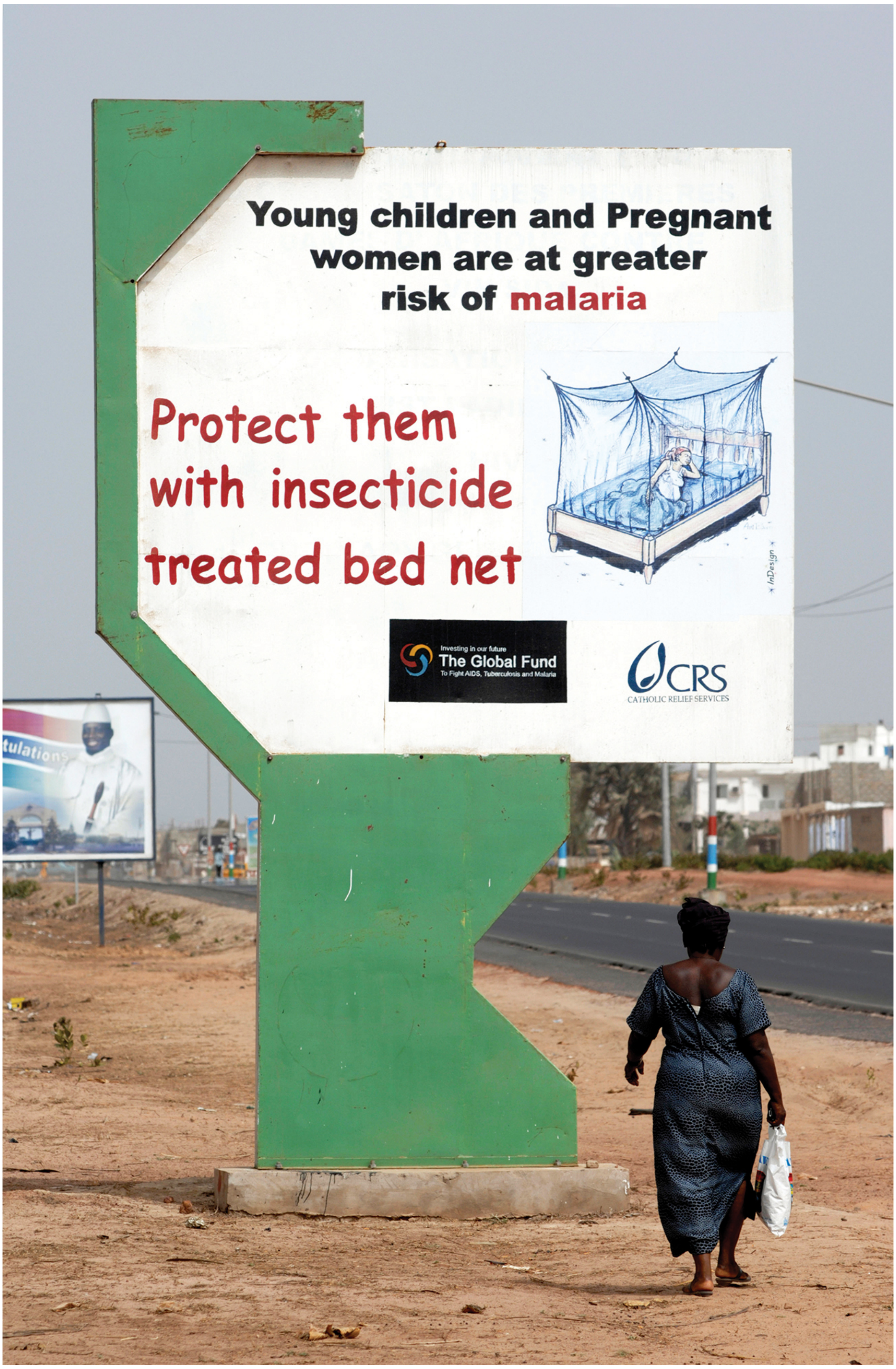
Second, given the strains that women increasingly face in juggling work and family roles, compounded by other stressors that disproportionately strike women, such as single parenthood or workplace discrimination, women may be more likely than men to be depleted and depressed by the daunting demands they face (Nolen-Hoeksema, 1993).

A major question for sociologists is whether the gender gap in life expectancy will continue to close in coming years. Many researchers believe that it will, yet for an unfortunate reason: Women's life expectancies may erode and thus become more similar to men's. As men's and women's gender roles have converged over the past several decades, women have increasingly taken on unhealthy "male-typed" behaviors such as smoking and alcohol use, as well as emotional and physical stress in the workplace. These patterns are particularly pronounced for women of low socioeconomic status. One recent study found that American women have lost ground with respect to life expectancy compared with women from other nations. In the early 1980s

the life expectancy of women in the United States ranked 14th in the world, yet by 2020 American women had fallen to 46th place (Karas-Montez & Zajacova, 2013; UN Population Division, 2022). Currently, the United States is ranked last in life expectancy for both men and women in comparable large and wealthy countries (Rakshit et al., 2022). These disheartening findings reveal that gender differences in health and mortality are a function not of biology alone but of the social advantages and adversities men and women experience in particular sociohistorical contexts.

# Global Health Inequalities

We've just documented stark disparities in health and mortality in the United States. Yet when we step back and look at health through a global lens, we see even bleaker disparities. Some low-income nations struggle to maintain basic living standards that are necessary for good health, such as adequate food, basic medical supplies, and clean water. Although major strides have occurred in reducing and, in some cases, eliminating infectious diseases worldwide, these strides have stalled in the era of the Covid-19 pandemic. Although Italy, China, and the United States were among the earliest nations affected and thus have received the most media coverage, there is hardly a country untouched. Lower-income countries also faced greater struggles in providing medical care to those infected with the virus. As of June 2021, Peru stood out as the nation with the greatest number of Covid deaths per capita, with death rates two to three times higher than other badly affected nations, including Brazil, Italy, the United Kingdom, and the United States. The deadly toll in Peru is due to multiple social factors, including a slow rollout of vaccines, an insufficient health care infrastructure, a disproportionate share of the population working in high-risk informal economy jobs, and overcrowded housing. Other consequences of poverty, like lack of refrigeration, mean that residents must frequently leave their homes to get food, putting them at increased risk of exposure to infected people (Horton, 2021).



Progress has slowed in the battle to eradicate malaria. Fully 90 percent of new malaria cases occur in Africa.

Peru, like many other low-income nations, lacks basic medical resources. The relatively few hospitals and trained doctors are concentrated in urban areas, where the affluent minority monopolizes their services. Most low-income countries have introduced some form of national health service, organized by the central government, but the medical services provided are limited. Wealthy persons may use private health care and sometimes travel to high-income, highly industrialized nations like the United States for sophisticated medical treatment. Conditions in many cities in the Global South, particularly in the shantytowns, make the control of infectious diseases very difficult. Shantytowns are made up of makeshift buildings or shacks, typically composed of materials such as mud and wood. Given this substandard infrastructure, many shantytowns lack basic services such as water, sewage systems, and garbage disposal.

Water and sanitation are critical factors for public health, yet many nations fall short on both dimensions. The World Health Organization (2019a) and UNICEF reported that in 2017, 2.2 billion people lacked safe water. Further, in 2017, 2 billion people lacked access to basic sanitation facilities such as toilets or latrines, and 673 million people still practiced open defecation. The vast majority of those without basic sanitation live in Asia and sub-Saharan Africa. These conditions are breeding grounds for diseases such as diarrhea, malaria, and trachoma, although the means of transmission varies based on the disease. For example, trachoma—an infectious eye disease that can cause blindness—is strongly related to lack of face washing, given the lack of water supply. This example vividly and sadly illustrates the powerful and varied ways that poverty affects health.

## Human Immunodeficiency Virus (HIV) and Acquired Immunodeficiency Syndrome (AIDS)

Covid-19 is not the only infectious disease to ravage populations in the United States and worldwide in contemporary times: HIV/AIDS is a devastating global epidemic. Since the start of the epidemic in the early 1980s, 40.4 million people have died from AIDS-related illnesses as of the end of 2022 (UNAIDS, 2023). More than 39 million people worldwide were living with HIV in 2022. In 2022 alone, 1.3 million people became newly infected with HIV and another 630,000 people died from AIDS-related illnesses (UNAIDS, 2023). The majority of people

affected in the world today are heterosexual and about half are women (UNAIDS, 2023).

Although the spread of HIV/AIDS in Western societies has slowed, the illness is still a source of crisis, especially in the developing world, where health education is limited and the medical establishment is poor. Fully 38 percent of new HIV infections occur in eastern and southern Africa, where 20.8 million people are currently living with HIV/AIDS (UNAIDS, 2023). But progress is being made: New infections have declined 54 percent overall between 2010 and 2022 (UNAIDS, 2023), and new infections among children ages 0 to 14 dropped by 75 percent; AIDS-related deaths dropped by 6.3 percent during the same period (UNAIDS, 2023). (See Global Map 18.2.)

In high-income countries, the rate of new infections has declined, yet the demographics are striking. Just as we reported on racial gaps in infant mortality and life expectancy earlier in this chapter, we now highlight stark Black-White differences in rates of HIV infection and treatment effectiveness. In the United States, approximately 38,500 people become infected with HIV each year, and roughly 1.1 million people are living with HIV. The incidence of infection, however, is not proportionately represented throughout the United States. In 2020, 51 percent of new AIDS diagnoses were made in the South. Although African Americans represent just 12 percent of the U.S. population, they accounted for 42 percent of HIV diagnoses in 2020. Hispanics are also disproportionately affected: They account for about 18 percent of the population but 27 percent of HIV diagnoses. In 2020, HIV infection among Whites was 39 percent less than that among Blacks and 5.8 percent less than that among Hispanics. Heterosexuals accounted for 22 percent of new infections in 2020, while men who have sex with men accounted for another 68 percent. Another 7 percent of cases were attributed to intravenous drug use (CDC, 2021b).

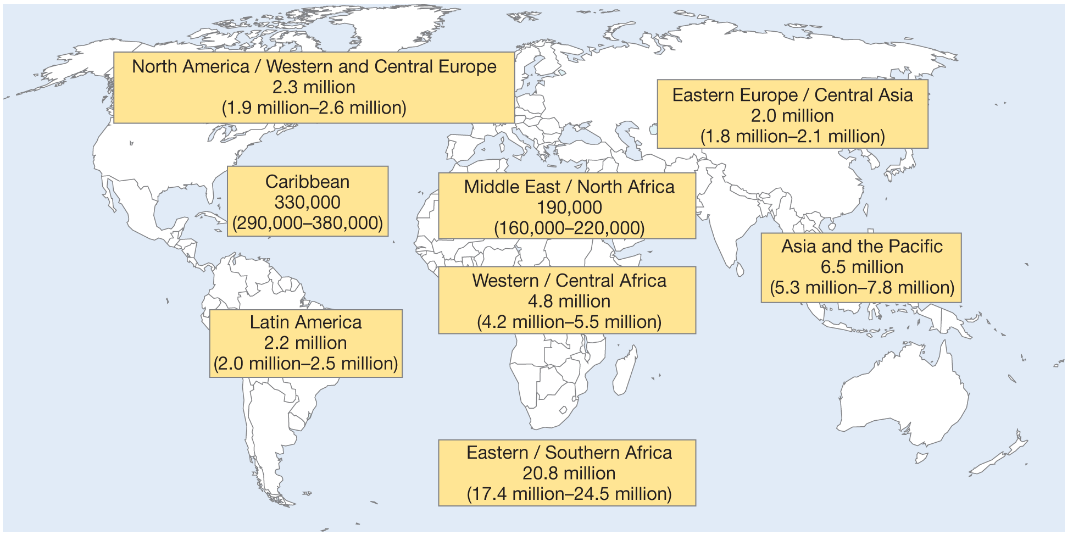
Although there was a steep drop in AIDS-related deaths after the introduction of antiretroviral therapy, African Americans are less likely than Whites to benefit from such life-prolonging treatments. In 2019, the death rate from HIV was highest among African Americans, with around 16.1 deaths per 100,000 population compared to 4.5 deaths among Hispanics and 2.5 deaths among Whites (CDC, 2021a).

Stigmatization of people with HIV/AIDS remains a major barrier to successful treatment. The stigma that associates HIV-positive status with sexual promiscuity, same-sex sexual relations, and IV drug use results in avoidance of HIV/AIDS prevention and treatment programs. In the United States, 13 percent of people living with HIV/AIDS do not know they are infected (CDC, 2021e). Part of the reason is the high level of fear and denial associated with being diagnosed as HIV positive. The stigma of having HIV/AIDS and the discrimination against people living with these infections are major barriers to the treatment of the epidemic worldwide. A recent study of 1,450 HIV-positive patients seeking care in India found that two-thirds of them reported authoritarian behavior from doctors, and 55 percent felt they were not treated in a dignified manner (Mehta, 2013).

Global Map 18.2

**THE NUMBER OF HIV-POSITIVE PEOPLE AROUND THE WORLD**

In 2021, there were 39 million people worldwide living with HIV. In that same year, 1.3 million people were newly infected with HIV; in sub-Saharan Africa, women and girls accounted for 63 percent of all new HIV infections.




Source: UNAIDS, 2023.

Besides the devastation to individuals who suffer from the disease, the AIDS epidemic is creating severe social consequences, including sharply rising numbers of children who are orphaned. Older adults are increasingly called on to provide physical care to their adult children who suffer from AIDS, or to care for their grandchildren who were orphaned by their parents' death from AIDS (Knodel, 2006). The decimated population of working adults combined with the surging population of orphans sets the stage for massive social instability; economies break down, and governments cannot provide for the social needs of orphans, who become targets for recruitment into gangs and armies.

HIV/AIDS has clearly been one of the most devastating infectious diseases in recent memory, yet medical breakthroughs in 2013 provided early evidence that a cure may someday be possible. In 2013, a baby born in Mississippi was treated with antiretroviral drugs within the first two days of the baby's birth. Doctors announced shortly thereafter that the baby had been cured of HIV; the baby is now a thriving toddler. Although observers were skeptical, their skepticism eroded when a second baby evidenced a similar recovery in March 2014 (McNeil, 2014). In 2019, the second-ever adult was found to be cured of HIV, with the first identified 12 years earlier (Mandavilli, 2019). Although scientists haven't reached consensus as to whether adults are actually "cured" or in long-term remission, productive strides continue.

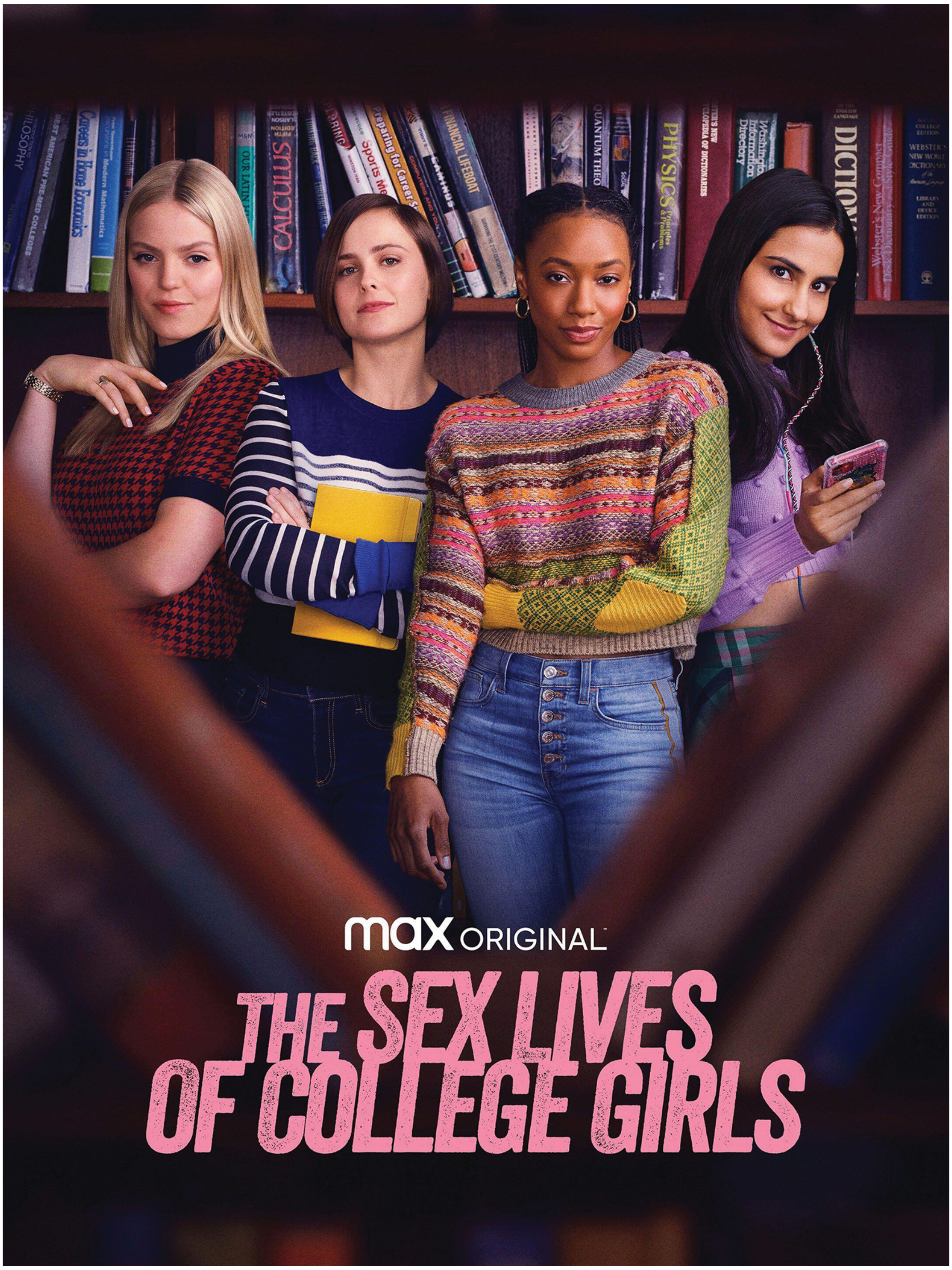
# Contemporary Research on Sexual Behavior Over the Life Course

As we learned in Chapter 10, sexuality can take many forms. Some prefer sexual partners exclusively of their own sex or the opposite sex, some prefer both, and others prefer to have no partner at all. Yet sexuality is a broad field of study in sociology, one that also focuses on sexual behavior as a factor linked to health, reproduction, and other issues related to the body. Scholars who study sexual behavior today owe a debt of gratitude to Alfred Kinsey; in the 1950s, his research was pioneering in that it was among the first truly scientific studies of adult sexuality. Despite its methodological flaws, the work was pathbreaking because it revealed the vast diversity in U.S. adults' sexual behavior. Since that time, public interest in, and research on, sexual health has flourished. Some of this research and interest was driven by the cultural zeitgeist at the time. In

the 1960s, social movements that challenged the existing order, such as those associated with countercultural lifestyles, broke with existing sexual norms. These movements preached sexual freedom, and the introduction of the contraceptive pill allowed sexual pleasure to be separated from reproduction. Women's groups also started pressing for greater independence from male sexual values, rejection of the double standard, and greater sexual satisfaction for women in their relationships. Until relatively recently, the extent of the changes in sexual behavior since the time of Kinsey's research was unclear.

In the late 1980s, Lillian Rubin (1990) interviewed 1,000 Americans between the ages of 13 and 48 to identify changes in sexual behavior and attitudes over the previous 30 years or so. Her findings indicated significant changes. Sexual activity begins at a younger age; moreover, teenagers' sexual practices are as varied and comprehensive as those of adults. There is still a double standard, but it is not as powerful as before. Contemporary scholarship confirms this finding. Studies of high school–age students find that sexual permissiveness is much greater today than it was in the 1970s. In 2019, 38.4 percent of high school students reported having sexual intercourse, and 8.6 percent reported having had four or more sexual partners. Both figures represent declines from 1991, when more than 54 percent of high school students had had sex and nearly 19 percent had had four or more partners (CDC, 2020b). Still, U.S. rates are far higher than those in Japan and China (Tang & Zuo, 2000; Toufexis, 1993).

Recent research on the sexual lives of college students shows that a "hookup" culture dominates college campuses, where both male and female students will have one-night stands, short-lived sexual relationships, or "friends with benefits" relationships in which friends will occasionally have sexual relations, without the expectation that their friendship will transform into a full-blown romance (Garcia et al., 2012; Hamilton & Armstrong, 2009; Wade, 2017). However, when a team of sociologists delved more closely into the sexual lives of college students, they found that while casual sexual encounters were relatively common, men and women were fairly selective in such encounters.




The HBO show *The Sex Lives of College Girls* depicts the complicated dynamics of the sexual behaviors of young adults.

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Sociologist Paula England and her colleagues (2012) interviewed more than 14,000 undergraduate students at 19 universities and colleges about their romantic and sexual lives. Nearly three-quarters (72 percent) of both women and men said that they had at least one "hookup" during their senior year. But, for most, hookups were relatively rare. Of those students

who said that they “hooked up,” equal proportions said that they had fewer than three (40 percent) or between four and nine (40 percent) hookups. Just one in five reported 10 or more hookups in their lifetimes. Moreover, not all of these hookups involved sexual intercourse. When asked about their most recent hookup, roughly one-third said they had participated in sexual intercourse, oral or manual stimulation of the genitals, or kissing and touching. And while TV shows and movies would lead us to believe that all college students are having sex, England and her collaborators found that fully 20 percent of college seniors had never had sexual intercourse.

Not surprisingly, the sexual activity of college students changed during the pandemic. One study found that more than half of college students reported a decrease in sexual activity during the pandemic, due largely to social isolation and social distancing practices (Firkey et al., 2022). However, those who did have sexual relationships reported greater levels of emotional intimacy and physical satisfaction than prior to the pandemic, underscoring an important theme in sexuality research today: Emotionally intimate consensual sexual activity can be an important source of emotional well-being, especially during stressful times (Herbenick et al., 2022).

Studies of the sexual lives of adults beyond college age reveal generally similar patterns. Research on U.S. adults indicates that they have relatively few sexual partners and less frequent sex than their counterparts in other nations. For example, in 1994 a team of researchers led by Edward Laumann published *The Social Organization of Sexuality: Sexual Practices in the United States*, the most comprehensive study of sexual behavior since Kinsey. Their findings reflect an essential sexual conservatism among Americans. For instance, 83 percent of their subjects had had only one partner (or no partner at all) in the preceding year, and among married people the figure was fully 96 percent, suggesting that only a tiny share of married people had been unfaithful to their spouse in the past year. Fidelity to one’s spouse was also quite common: Only 10 percent of women and less than 25 percent of men reported having an extramarital affair during their lifetime. According to the study, Americans average only three partners during their entire lifetime. Despite the apparent ordinariness of sexual behavior, some distinct historical changes were revealed in this study, the most significant being

a progressive increase in the level of premarital sexual experience, particularly among women.

Although the sociological study of sexuality has historically focused on younger people, researchers are increasingly documenting sexual activity among older persons (Karraker et al., 2011). Despite outdated stereotypes that older adults are uninterested in sex, research consistently shows that a healthy and loving sexual relationship is an important part of older adults' lives. One recent study found that three-quarters of men and half of women in their sixties, seventies, and older said that sex was an important part of their life (Waite et al., 2021). Age-related biological changes like drops in estrogen and testosterone mean that some older couples must adapt their sexual activities, with foreplay, oral sex, or cuddling often replacing intercourse (Liu et al., 2019; Waite et al., 2009). Still, one in four partnered adults aged 75 to 85 reports having sexual relations at least once a week (Waite et al., 2009). Couples with the happiest and most supportive unions tend to report the greatest sexual satisfaction, although a common problem is a discrepancy in partners' sexual interest, especially if one has serious health declines. But most long-married couples say sexual and physical intimacy is a source of comfort and fulfilment.

# Reproduction in the Twenty-First Century: Pushing the Limits of Technology

Another area of research among contemporary scholars is the ways that science and technology shape experiences of the body. The development of technologies—ranging from reproductive technologies to the development of medications that help our mental health, physical health, and even sexual performance—has created a context where we have much more control over our bodies today than in the past. Yet this "control" presents us with both exciting possibilities and new anxieties and problems. All this development is part of what sociologists call the socialization of nature—a process in which phenomena that used to be "natural," or given in nature, become social, in that they depend on our personal decisions.

## Childbirth

Giving birth is often described as a “natural” and “beautiful” part of life. For hundreds of years, most women’s lives were dominated by childbirth and child-rearing. In premodern times, contraception was ineffective or unknown. Even as late as the eighteenth century in Europe and the United States, women commonly experienced as many as 20 pregnancies (often involving miscarriages and infant deaths). Today, owing to improved methods of contraception, women in industrialized countries no longer have so many pregnancies. Advances in contraceptive technology enable most women and men to control whether and when to have children. Yet while reproduction “takes two,” sociologists document that women still shoulder the burden of obtaining and effectively using birth control, and preventing pregnancy (Littlejohn, 2021).

Contraception is only one procreative technology. Prospective parents also are turning to technologies that increase their chances of conceiving a child. As we learned in Chapter 15, young people are delaying marriage and childbearing today, waiting until they complete their schooling and are financially stable. However, women’s capacity to become pregnant starts to decline in their thirties, meaning that rising numbers of couples may need to rely on technological interventions to have children. Fertility drugs, in vitro fertilization (IVF), artificial insemination, and hormone treatments are among the technologies that are assisting couples in their desire to start a family (Franklin, 2013). The use of assistive reproductive technologies (ART) also is altering the nature of family life; the number of twins born in the United States increased by roughly 50 percent, and the number of triplet or higher-number births soared by 404 percent between 1980 and 1997 (Martin & Park, 1999). From 1980 to 2004, increases in the number of twin births averaged nearly 3 percent a year (peaking at more than 4 percent from 1995 to 1998). From 2005 to 2011, however, the pace of increase slowed to 0.5 percent annually (Martin et al., 2013). The National Center for Health Statistics reported that between 2014 and 2018 the birth rate of twins decreased on average 1 percent annually, or 4 percent during the time period (Martin & Osterman, 2019). In 2020, of all pregnancies conceived specifically through ART, about 87 percent were singletons, 12 percent twins, and 0.4 percent triplets (Sunderam et al., 2022). This rise and plateauing in multiple births is partially explained by the growing popularity of fertility drugs such as

clomiphene and procedures such as in vitro fertilization, which result in multiple births more frequently than unassisted fertilizations do.

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**CONCEPT CHECKS**

1. **In what ways does race matter for health?**
2. **What are the two main explanations for the gender gap in health? Why do experts think this gap may decrease in the future?**
3. **Why are infectious diseases more common in developing nations than in the United States today?**
4. **Describe patterns of adolescent sexual behavior in contemporary U.S. society.**
5. **Describe two ways that the development of new technologies has led to the "socialization of nature."**

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# Glossary

health disparities
: Inequalities in health, health care, and health behaviors across different racial, ethnic, and socioeconomic groups.

social epidemiology
: The study of the distribution and incidence of disease and illness within a population.

health literacy
: One's capacity to obtain, process, and understand the basic health information and services needed to make appropriate health decisions.

vaccine hesitancy
: The reluctance or refusal to have oneself or one's children vaccinated.

socialization of nature
: The process by which we control phenomena regarded as "natural," such as reproduction.

procreative technology
: Techniques for influencing the human reproductive process.

# 4 UNANSWERED QUESTIONS

**Understand the state of current research on the link between health and income inequality. Learn about complementary and alternative medicine (CAM), gendered patterns of body image concerns, and rising levels of depression and anxiety among young people today.**

As you have learned throughout this chapter, the sociological study of the body and sexuality is a fascinating and rapidly evolving field. Each day, social scientists struggle with new and vexing questions about the ways that social, biological, technological, economic, and cultural forces transpire to promote (or constrain) physical and sexual well-being. We briefly describe here four unanswered questions that sociologists are now investigating, using the most sophisticated data, methods, and conceptual models.

## Does Income Inequality Threaten Health?

As we learned in Chapter 8, the distribution of income in the United States is highly unequal, and this gap is widening. At the end of 2021, the richest 1 percent of U.S. households owned a record 32.3 percent of the nation's wealth, while the bottom 90 percent held about 30 percent (Blanchet et al., 2023). Some researchers have argued that societies with a vastly unequal distribution of economic resources are unhealthy societies, and that disparities take a toll on all.

British researcher Richard Wilkinson (1996) is one of the most vocal advocates of the argument that the healthiest societies are not necessarily the richest ones but those in which income is distributed most evenly and levels of social integration are highest. In surveying empirical data from countries worldwide, Wilkinson notes a clear relationship between mortality rates and patterns of income distribution. Inhabitants of countries such as Japan and Sweden, which are among the most egalitarian societies in the world, enjoy better levels of health than do citizens of countries with a more pronounced gap between rich and poor, such as the United States. In Wilkinson's view, growing income inequality undermines social cohesion and makes it more difficult for people to manage risks and challenges. Wilkinson argues that social factors—the strength of social

contacts, ties within communities, a sense of security—are the main determinants of the health of a society.

Wilkinson's thesis—that income inequality harms health—has provoked energetic debates. Some claim that his work should become required reading for policy makers and politicians. They agree that the drive toward prosperity has failed many members of society and that it is time to consider more humane and socially responsible policies to support those who are disadvantaged (Kawachi & Kennedy, 1997). Others criticize his study on methodological grounds and argue that he has not demonstrated a clear causal relationship between income inequality and poor health (Judge, 1995). Illness, critics contend, could be caused by any number of other factors. They argue that the empirical evidence for Wilkinson's claims remains suggestive at best.

Several recent empirical studies may help successfully resolve this debate. Zheng (2012) tracked income inequality in the United States from 1986 through 2004 and then examined whether these trends predicted increases in poor health and mortality several years into the future. Zheng found that for every .01 increase in the Gini coefficient—a standard measure of a country's economic disparity, where 0 represents perfect equality and 1 represents maximum inequality—an average person's cumulative risk of death increased by 112 percent over the next 12 years. Similarly, a recent study of income inequality and Covid-19 found that each 1 percent increase in the Gini coefficient was associated with a 4 percent increase in cases per million and a 5 percent increase in deaths per million (Wildman, 2021). More generally, a recent meta-analysis found that more than half of published studies on income inequality and mental health supported the income inequality hypothesis, with similar patterns among high-, low-, and middle-income nations (Tibber et al., 2022).

Despite compelling empirical evidence that income inequality undermines health, we still don't fully understand the reasons for this. Some scholars have hypothesized that in countries with rising income inequality, the interests of the wealthy tend to diverge from those of the rest of society. The wealthiest people may push government for more services for themselves, rather than invest in public goods such as education or affordable medical services—services that can affect health for the majority of people (Zheng, 2009, 2012). Lower-income people may not be able to secure the health-enhancing goods and services they need, whether housing, groceries, or medical care, because their wealthier peers are

driving up demands and costs (Piketty, 2014). Others argue that inequality may create a culture of upward comparison, where many people see the lifestyles of the rich and feel they can't live up to expectations. Upward comparison can lead to negative views of oneself, frustration, and depression, which have been linked to sickness and mortality (Kawachi & Kennedy, 1997; Pickett & Wilkinson, 2011). In consistence with this notion, recent cross-national studies show that levels of depression are higher in countries with high levels of income inequality, and a feeling of "status anxiety" partially accounts for this linkage (Layte, 2012).

# Is Alternative Medicine as Effective as "Mainstream" Medicine?

Many Americans have become frustrated or disenchanted with mainstream health care in the United States, paying high costs for care yet not receiving the cure or relief they hope for. This is part of the reason why more and more patients are seeking alternative pathways to health, like acupuncture, herbal treatments, massage, tai chi, and other approaches that are not a part of standard medical care.

Medical sociologists refer to such practices as complementary and alternative medicine (CAM). CAM encompasses a diverse set of approaches and therapies for treating pain, reducing illness, and promoting well-being that generally fall outside standard medical practices. Historically, these approaches have not been taught in medical schools and have not been practiced by physicians or other professionals trained in medical programs. However, in recent years medical and nursing schools have started offering courses in alternative medicine (Fenton & Morris, 2003). Examples of common CAM therapies include chiropractic, massage, deep-breathing techniques, homeopathy, reflexology, herbal remedies, and acupuncture. Complementary medicine is distinct from alternative medicine in that the former is meant to be used in conjunction with medical procedures to increase their efficacy or reduce side effects, while the latter is meant to be used in place of standard medical procedures (Saks, 1992). Some alternative approaches, such as homeopathy, reject the basis of orthodox medicine entirely, whereas integrative medicine uses in equal parts CAM and traditional approaches.

Acupuncture is a popular CAM therapy. Women and those with higher levels of education are more likely to use CAM.

Industrialized countries have some of the best-developed, best-resourced medical facilities in the world. Why, then, are a growing number of people exploring treatments that have not yet proven effective in controlled clinical trials, such as aromatherapy and hypnotherapy? About one in three U.S. adults have used some form of CAM in the past year (Clarke et al., 2015; Gadde et al., 2020). CAM use is more frequent among women and individuals with higher levels of educational attainment. Furthermore, Whites are more likely to use CAM than their Black and Asian counterparts. The most common reasons people use such treatments are back, neck, and joint pain (Barnes et al., 2008).

There are many reasons for seeking the services of an alternative-medicine practitioner or pursuing CAM regimens on one's own. Some people perceive orthodox medicine to be deficient or ineffective in relieving chronic pain or symptoms of stress and anxiety. Especially in the wake of the opioid crisis, patients and health care providers alike are committed to finding alternative, non-pharmaceutical-based approaches to pain treatment, another factor contributing to the increase in CAM use (Fleming et al., 2007). Others are dissatisfied with features of modern health care systems such as long waits, referrals through chains of specialists, and financial restrictions. Connected to this dissatisfaction are concerns about

the harmful side effects of medication and the intrusiveness of surgery, both staples of modern Western medicine. The asymmetrical power relationship between doctors and patients also drives some people to seek alternative medicine. Those people feel that the role of the passive patient does not grant them enough input into their own treatment and healing. Finally, some individuals profess religious or philosophical objections to orthodox medicine, which treats the mind and body separately. They believe that orthodox medicine often overlooks the spiritual and psychological dimensions of health and illness. All these concerns are critiques of the biomedical model of health (the foundation of the Western medical establishment), which defines disease in objective terms and holds that scientifically based medical treatment can restore the body to health (Beyerstein, 1999).

The growth of alternative medicine is a fascinating reflection of the transformations occurring within modern societies. We are living in an age when much more information is available to draw on when making choices. A proliferation of health-related websites and apps, such as WebMD and MedicineNet, and fitness trackers, such as Fitbit, provide instant access to information on health symptoms and treatments. Thus, individuals are increasingly becoming health consumers, adopting an active stance toward their own health and well-being. Not only are we choosing the type of practitioners to consult, but we are also demanding more involvement in our own care and treatment.

Card-carrying medical marijuana patients attend a cannabis farmers' market in Los Angeles. As of 2022, 39 states and the District of Columbia had legalized marijuana for medical use.

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One dramatic change over the past two decades has been the acceptance and use of medical marijuana and related products like CBD. As of July 2022, 39 of the 50 U.S. states and the District of Columbia had legalized marijuana for medical use, and 19 states and the District of Columbia had legalized marijuana for recreational use. According to national surveys, 91 percent of Americans support the legal use of marijuana for medical and recreational purposes (Daniller, 2019). Advocates of medical marijuana cite clinical trial data to show that it helps soothe pain and allay nausea, especially for patients with fibromyalgia, glaucoma, multiple sclerosis, some cancers, and neuropathy (e.g., Campbell et al., 2001). The use of CBD (cannabidiol) also has skyrocketed, with sales projected to hit $16 billion in the United States by 2025. CBD is the natural chemical found in the *Cannabis sativa* plant; it is now used in a dizzying array of natural treatments, including pills, candies, gum, cosmetics, lotions, and even pet products (MacKeen, 2021). Despite early battles regarding the legitimacy of such treatments, the majority of doctors agree that mainstream and alternative remedies can be used effectively in tandem to meet patient needs.

# Are Eating Disorders Primarily a "Women's" Problem?

We learned earlier in this chapter that one of the most serious concerns threatening the health of Americans today is the obesity epidemic. Yet as college students, you may notice that some of your classmates are dieting or exercising excessively, striving to emulate their favorite Instagram and TikTok celebrities. You may think that another equally important body-weight issue faces our nation: excessive slenderness and eating disorders such as anorexia nervosa and bulimia. These are serious social problems, and ones that disproportionately strike women—but why? And why are young men increasingly monitoring their calorie intake, upping their time at the gym, or even turning to steroids in the hopes of having "Adonis"-like physiques (Pope et al., 2002)?

It's important first to step back and consider the history of such conditions. Anorexia, an eating disorder characterized by extreme food restriction and an irrational fear of gaining weight, is thought of as a contemporary social problem, but the condition was first identified as a disorder in France in 1874. It remained obscure until the past 40 or 50 years and has since become increasingly common among young women (Brown & Jasper, 1993). So has bulimia—bingeing on large portions of food, followed by self-induced vomiting. Anorexia and bulimia often occur in the same individual. A recent study estimates that 1.3 million women and 450,000 men suffer from anorexia, 2.25 million women and 750,000 men suffer from bulimia, and 5.25 million women and 3 million men suffer from binge eating. A total of 30 million Americans, or about 9 percent of the population, suffer from one or more forms of eating disorders (Eating Disorders Coalition [EDC], 2009; National Association of Anorexia Nervosa and Associated Disorders, 2020).

Anorexia has the highest mortality rate of any psychological disorder. One longitudinal study found that people with anorexia were about five times more likely to have died over the course of the study than their peers in the general population (Fichter & Quadflieg, 2016). Once a young person starts to diet and exercise compulsively, they can become locked into a pattern of refusing food or vomiting up what they have eaten. As the body loses muscle mass, it loses heart muscle, so the heart gets smaller and weaker, which ultimately leads to heart failure. About half of all anorexics also have low white blood cell counts, and about a third are anemic. Both conditions can lower the immune system's resistance to disease, leaving an anorexic vulnerable to infections. However, these harmful patterns may be broken through psychotherapy and medical treatment.

An anorexic woman (right) has starved herself thin; people suffering from anorexia feel compelled to lose weight by a variety of social and personal pressures, often continuing to view themselves as overweight even when they have reached a state of emaciation. Eating disorders are unlikely to disappear as long as

severely underweight fashion models and actresses (left) are uphel as paragons of beauty.

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These harmful consequences are particularly devastating when one considers that the occurrence of eating disorders in the United States has doubled since 1960 (EDC, 2009). Over 80 percent of 10-year-old children are afraid of being fat (EDC, 2003). About 95 percent of U.S. college women say they want to lose weight, and up to 85 percent suffer serious problems with eating disorders during their college years. Around 25 percent experience bulimic episodes or anorexia. In American society, 60 percent of girls age 13 have already begun to diet; this proportion rises to over 80 percent for women age 18.

Boys and young men also suffer from body image dissatisfaction and unhealthy behaviors, with these patterns far more widespread than

previously thought. About 50 percent of American male college students want to lose weight, while about 30 percent are on diets (Hesse-Biber, 1997). Another study of boys ages 11 to 18 found that one-third were dissatisfied with their bodies, with athletes especially self-critical (Skemp et al., 2019). Young men also are sensitive to the unrealistic body images they see on TikTok, with some falling prey to a condition known as "bigorexia." *The New York Times* has referred to this as "a form of muscle dysmorphia exhibited mostly by men and characterized by excessive weight lifting, a preoccupation with not feeling muscular enough and a strict adherence to eating foods that lower weight and build muscle" (Hawgood, 2023).

Emerging research shows that trans young people also evidence body dissatisfaction and may take harmful steps to attain their ideal body image. For example, transmasculine young people may restrict their calories to unhealthy levels as a way to limit growth of their breasts, narrow their hips, and eliminate their periods. Transfeminine young people might strive to lose muscle mass and achieve a very slender female ideal. Nonbinary people may strive to be very thin, in consistence with images of androgynous people in popular culture. Although population-based data are limited, some studies estimate that 5 to 10 percent of transgender young people have an eating disorder (Nagata et al., 2020).

A desire to attain an unrealistic body ideal—and the resulting eating disorders—extends beyond the United States and Europe. Although ad campaigns and magazines, most notably the Dove "Be Real" campaign, have recently made efforts to feature a broad range of body sizes and shapes, images of slender models continue to outnumber images of models with more realistic bodies. The average fashion model is 23 percent thinner than the average American woman; 25 years ago, that number was 8 percent (Derenne & Beresin, 2006). As Western images of feminine beauty have spread to the rest of the world, so have associated illnesses. Eating problems also have surfaced among young, primarily affluent women in Hong Kong and Singapore, and in urban areas in China, India, Pakistan, the Philippines, and Taiwan (Efron, 1997).

Cultural pressures to comply with particular body ideals have potentially lethal consequences since both eating disorders and steroid use are linked with heart problems, depression, and other conditions, even among adolescents (Achar et al., 2010; Goldman et al., 2019). Given how harmful eating disorders are, why do they persist? Body image disorders are rooted

in feelings of shame and a desire to have control over one's body. The individual feels inadequate and imperfect, and their anxieties about how others perceive them become focused through feelings about their body. At that point, shedding weight becomes the means of making everything right in the world. Sociologists believe that as long as young people are raised to equate their self-worth with their physical appearance, eating disorders will persist.

# Why Are Young People Today So Depressed and Anxious?

Adolescence and young adulthood can be challenging times, as young people struggle to understand who they are and what the future holds for them. Yet in recent years, these challenges have intensified, and unprecedented numbers of young people suffer from depression, anxiety, and other mental health problems. According to the CDC (2022d), between 2009 and 2021 the proportion of U.S. high school students who reported "persistent feelings of sadness or hopelessness" increased from 26 percent to 44 percent, an all-time high. Rates of sadness had been climbing steadily since 2009, yet the most dramatic increase occurred between 2020 and 2021, a function of the pandemic. The social isolation of the pandemic exacted a particularly harsh toll on girls and LGBTQ+ teens. More than 25 percent of girls and nearly half of LGBTQ+ teens said they had seriously contemplated attempting suicide in the pandemic, compared to just 12 percent of heterosexual boys.

While the pandemic was emotionally devastating for many, the rising levels of depression and other mental health problems among U.S. youth started far before Covid. While girls and LGBTQ+ youth are at particular risk, the CDC has documented rising rates of sadness and hopelessness for boys and girls, LGBTQ+ and straight, Black and White, and rich and poor. This raises the important question for social scientists of "why?" This question is especially vexing because young people have been faring better than in the past along many other dimensions of physical and mental health. Rates of teenage sex, drunk driving, school fighting, and school bullying have declined since the 1990s (Johnston et al., 2021; Keyes et al., 2019).

It's not just teens who have been increasingly susceptible to mental health problems over the past two decades; young adults also are at heightened risk (Goodwin et al., 2020). Between 2008 and 2018, the proportion of young adults aged 18 to 25 with anxiety nearly doubled from 8 percent to 15 percent, yet comparable jumps were not detected in other age groups. A CDC survey of young adults aged 18 to 24 carried out during the pandemic in 2020 found that a stunning 25 percent had contemplated suicide in the past month, 63 percent reported depression or anxiety, and a quarter had increased their use of drugs or alcohol to cope with the stress of the pandemic (Czeisler et al., 2020).

Researchers do not have a simple explanation for the rising malaise of U.S. youth. Some are skeptical that young people are doing worse today than two decades ago, suggesting that they now are more willing to admit feeling depressed, due to the diminishing stigma of depression. This view is partially supported by data showing that sales of prescription medication to treat depression and related mood disorders among adolescents and young adults, as well as outpatient medical visits for depression treatment, increased substantially starting in the mid-1990s. Seeking mental health care is viewed as a sign that young people are no longer suffering in silence (Costello et al., 2006). Other skeptics point out that pubertal factors (such as increases in sex steroid hormones) are linked with depression among girls. As the age of menarche has declined over the past few decades, a greater proportion of young teenage girls are at risk of depression. This argument is dampened by the fact that the age of menarche declined by just 2.5 months since the 1960s, hardly enough to have had a substantial influence on rates of depression overall (Parent et al., 2003).

Most researchers believe the increase is real, and not a methodological artifact, noting that young people are exposed to more stress than ever before. Family stress, fears about getting into and paying for college, political polarization, climate change, school shootings, the pandemic, racially motivated violence, and other global concerns have intensified, and young people are increasingly aware of world events due to a 24-hour news cycle and relentless exposure through social media (e.g., Wu et al., 2020). Some observers lay particular blame on the internet, saying that it bombards young people with unrealistic images of physical attractiveness, promoting a negative self-image. Some note that fear of missing out (FOMO) is real, as young people see their friends living lives that appear far more fun than their own. Empirical evidence is mixed, showing both

benefits and costs associated with the internet, yet the costs are most profound for younger teens (ages 11 to 14) who cannot yet discern reality from the carefully manufactured images that they see on their smartphones (Orben et al., 2022).

Lack of meaningful social interaction is another explanation offered: Sociologists note that the combination of the pandemic and reliance on text messages as a main form of communication is depriving young people of emotional support and connection. Compared with young people two decades ago, teenagers today are less likely to go out to meals or movies with their friends, get their driver's license, or play team sports (Twenge, 2019). While many people experienced feelings of loneliness during the pandemic, these increases were sharpest among teens, who benefit from social support from friends and mentors, especially as they manage life's stresses. The answer to the question of why young people today are so distressed is clearly multifaceted, yet most agree that major social changes are needed to ensure the emotional well-being of current and future generations of teens and young adults.

The sociology of health, illness, and the body is a fascinating and ever-evolving field. As sociologists look to the new decade, they will learn much more about how and why diseases like Covid-19 spread so quickly, why some populations are especially vulnerable, and the ways that everyday life is affected by the disease's spread. As new health conditions arise, some will be stigmatized and others will not, and medical sociologists will develop insights, policies, and practices to help people manage their illness and the challenges that accompany it.

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**CONCEPT CHECKS**

1. **What are two possible reasons income inequality affects health?**
2. **Name three reasons a person might turn to complementary and alternative medicine.**
3. **Why are young women at the greatest risk of suffering from an eating disorder?**
4. **What are the main reasons why rates of depression and anxiety among adolescents and young adults have risen over the past decade?**

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# Glossary

Gini coefficient
: A standard measure of a country's economic disparity, where 0 represents perfect equality (everyone has the same income) and 1 represents maximum inequality.

complementary and alternative medicine (CAM)
: A diverse set of approaches and therapies for treating illness and promoting well-being that generally fall outside standard medical practices.

biomedical model of health
: The set of principles underpinning Western medical systems and practices. The biomedical model of health defines diseases objectively, in accordance with the presence of recognized symptoms, and holds that the healthy body can be restored through scientifically based medical treatment. The human body is likened to a machine that can be returned to working order with the proper repairs.

# THE BIG PICTURE

# Chapter 18

## The Sociology of the Body: Health, Illness, and Medicine

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**Exercises:** Thinking Sociologically

1. Obesity is a major health concern in the United States, especially among poor, Black, and Latino Americans. What types of public programs do you believe will be most effective in fighting the obesity epidemic? Why do you think the programs you've proposed are necessary?
2. Statistical studies of our national health show a gap in life expectancies between the rich and the poor. Review all the major factors that would explain why rich people live about eight years longer than poor people.

# BASIC CONCEPTS p. 734

## Learning Objectives

Understand how social, cultural, and historical contexts shape attitudes toward health, illness, and health behaviors.

## Terms to Know

obesity • food deserts • body mass index (BMI) • sociology of the body • health

## Concept Checks

1. Define the term *health*.
2. Define and provide an example of medicalization.
3. Describe three features of modern medicine.

# THEORIES AND HISTORICAL APPROACHES TO UNDERSTANDING HEALTH, ILLNESS, AND HEALTH BEHAVIORS p. 737

## Learning Objectives

Learn about theoretical perspectives on physical and mental health and illness, and health care in contemporary society, as well as the approaches to studying health and bodies throughout history.

## Terms to Know

sick role • stigma

## Concept Checks

1. Describe how the primary causes of death have changed between colonial times and the present day.
2. How do functionalist theorists and symbolic interactionists differ in their perspectives on health and illness?
3. Describe several changes in sexual behavior over the past two centuries.

4. What are the most important contributions of Alfred Kinsey's research on sexuality?

# RESEARCH ON HEALTH, ILLNESS, AND HEALTH BEHAVIORS TODAY p. 748

## Learning Objectives

Learn about health patterns in the United States according to social class, gender, and race, and understand the competing explanations for the persistence of these patterns. Understand how society and culture influence health behaviors, including sexual health.

## Terms to Know

health disparities • social epidemiology • health literacy • vaccine hesitancy • socialization of nature • procreative technology

## Concept Checks

1. In what ways does race matter for health?
2. What are the two main explanations for the gender gap in health? Why do experts think this gap may decrease in the future?
3. Why are infectious diseases more common in developing nations than in the United States today?
4. Describe patterns of adolescent sexual behavior in contemporary U.S. society.
5. Describe two ways that the development of new technologies has led to the "socialization of nature."

# UNANSWERED QUESTIONS p. 767

## Learning Objectives

Understand the state of current research on the link between health and income inequality. Learn about complementary and alternative medicine (CAM), gendered patterns of body image concerns, and rising levels of depression and anxiety among young people today.

### Terms to Know

Gini coefficient • complementary and alternative medicine (CAM) • biomedical model of health

### Concept Checks

1. What are two possible reasons income inequality affects health?
2. Name three reasons a person might turn to complementary and alternative medicine.
3. Why are young women at the greatest risk of suffering from an eating disorder?
4. What are the main reasons why rates of depression and anxiety among adolescents and young adults have risen over the past decade?

## Glossary

obesity
: Excessive body weight, indicated by a body mass index (BMI) over 30.

food deserts
: Geographic areas where residents do not have easy access to high-quality affordable food. These regions are concentrated in rural areas and poor urban neighborhoods.

body mass index (BMI)
: A measure of body fat based on height and weight.

sociology of the body
: A field that focuses on how our health and illness are affected by social and cultural influences.

health
: A state of complete physical, mental, and social well-being rather than merely the absence of disease or infirmity.

sick role

A term used by the functionalist Talcott Parsons to describe the patterns of behavior that a sick person adopts to minimize the disruptive impact of their illness on others.

stigma

Any physical or social characteristic that is labeled by society as undesirable.

health disparities

Inequalities in health, health care, and health behaviors across different racial, ethnic, and socioeconomic groups.

social epidemiology

The study of the distribution and incidence of disease and illness within a population.

health literacy

One's capacity to obtain, process, and understand the basic health information and services needed to make appropriate health decisions.

vaccine hesitancy

The reluctance or refusal to have oneself or one's children vaccinated.

socialization of nature

The process by which we control phenomena regarded as "natural," such as reproduction.

procreative technology

Techniques for influencing the human reproductive process.

Gini coefficient

A standard measure of a country's economic disparity, where 0 represents perfect equality (everyone has the same income) and 1 represents maximum inequality.

complementary and alternative medicine (CAM)

A diverse set of approaches and therapies for treating illness and promoting well-being that generally fall outside standard medical practices.

biomedical model of health

The set of principles underpinning Western medical systems and practices. The biomedical model of health defines diseases objectively, in accordance with the presence of recognized symptoms, and holds that the healthy body can be restored through scientifically based medical treatment. The human body is likened to

a machine that can be returned to working order with the proper repairs.

# 19 Population, Urbanization, and the Environment

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What do you think is the most widely accepted official prediction for the global population in 2050?

1. **9–10 billion**
2. **14–15 billion**
3. **19–20 billion**
4. **24–25 billion**
5. **29–30 billion**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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## LEARNING OBJECTIVES

1. **Basic Concepts** Learn the key concepts demographers use to understand world population growth and the changes in cities.
2. **Urban Sociology: Some Influential Theories** Understand how theories of urbanism have placed an increasing emphasis on the influence of socioeconomic factors on city life.
3. **Population Growth, Urbanization, and Environmental Challenges: Recent Research** See how the environment is a sociological issue related to industrialization, urbanization, and population growth.
4. **Unanswered Questions** Consider that global population growth will outstrip our resources, and what might be the best sociologically informed approach to environmental change.

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At the time of Christ's birth roughly 2,000 years ago, there were around 300 million people in the entire world—fewer than the 335 million who live in the United States today (U.S. Bureau of the Census, 2023a). It took nearly all of human history to add the first billion people to our planet, a number that was reached only two centuries ago, around 1800. It took another 130 years (until 1930) to add the second billion, 30 years (until 1960) to add the third billion, and 15 years (until 1975) to add the fourth billion. Since that time, every 12 years the world's population has added another billion people, reaching 7 billion in 2011 (to signal this momentous event, the United Nations designated Danica May Camacho, born in the Philippines on October 31, as "baby number 7 billion"). By the time you are reading this textbook, the global population will have grown to approximately 7.9 billion (U.S. Bureau of the Census, 2023a). Such rapid growth has enormous implications for the way people live, and for the quality of their lives. Indeed, as humans transform the earth's forests and savannahs into giant cities and farms, there is widespread agreement among climate scientists that the entire planet is under threat.

It is difficult to predict with any precision the rate at which the world population will rise, but United Nations researchers have produced several scenarios based on recent trends. Their most likely estimate assumes "medium" levels of fertility: roughly two children being born,

on average, to women throughout the world. (Obviously, some women will have more children and some fewer; this is an estimated average.) According to this scenario, the world population will reach 9.7 billion people by 2050 before stabilizing at 10–12.5 billion by the end of the century. The correct answer, then, is 9–10 billion, at the low end of the choices in our opening quiz (UN Department of Economic and Social Affairs [DESA], 2019b). This may seem like good news: The rate of population growth appears to have slowed quite a bit. Instead of adding a billion people every 12 years, over the next three decades a billion will be added every 15 years.

Unfortunately, this slowdown is not as hopeful as it seems. Unless there are changes in the way humans live, even current population levels—much less adding billions more people to the planet—may prove unsustainable. In this chapter, we will examine the ways in which people are affecting the planet. We will begin by looking at population growth, since more people mean additional demands on planetary resources. We will then examine urbanization, the "built environment" in which rapidly growing populations live, and which has significant impacts on the natural environment. The combined forces of urbanization, industrialization (previously discussed in Chapter 14), and population growth now threaten to result in major environmental changes throughout the planet—changes that will be most strongly felt throughout your lives after college.

We will examine these changes in detail, and how they might be best addressed through the lens of sociology. We conclude with two unanswered questions—one concerning the likely relationship between global population growth and global food production, the other asking whether current efforts to address the major environmental changes that are occurring are likely to be successful, or if some other, radically different approaches are needed.

# 1 BASIC CONCEPTS

**Learn the key concepts demographers use to understand world population growth and the changes in cities.**

## Population Analysis: Demography

As we saw in the opening discussion, the human population has exploded over the last few centuries. It is important to understand the dynamics of population growth because when it comes to the effect of humans on the planet, numbers matter.

Given the importance of understanding the dynamics and effects of human population growth, an entire field has emerged to study it scientifically: demography. The term has its roots in ancient Greek: *demos* (the people) and *graphos* (writing, recording). It was invented about a century and a half ago, at a time when nations were beginning to keep official statistics on the size of their populations, in an effort to explain population growth, decline, and geographical distribution. As we shall see, such population dynamics are governed by three factors: births, deaths, and migrations. Demography is therefore often treated as a branch of sociology because these factors are largely social and cultural in nature.

Much demographic work tends to be statistical, relying on large-sample surveys as well as on official birth and death records. Virtually all countries in the world today gather and analyze basic statistics on their entire populations by carrying out systematic surveys called censuses. Although every effort is made to count each and every person, censuses still are not 100 percent accurate, nor is every individual adequately represented. In the United States, for example, a comprehensive population census every 10 years (the decennial census) is mandated by the Constitution, and sample surveys are also regularly conducted. Yet many people are not counted in the official population statistics, including undocumented immigrants, homeless people, transients, and others who, for one reason or another, either did not complete their surveys or were not located by census takers. In many countries in the

Global South, particularly those with recent high rates of population growth, demographic statistics are much more unreliable.

Among the basic concepts demographers use, the most important are crude birthrates, fertility, and crude death rates. Crude birthrates are expressed as the number of live births per year per 1,000 persons in the entire population. They are called "crude" rates because they do not focus on women of childbearing age, which is a much better predictor of population growth: A population with a high percentage of young women can be expected to have a much higher birthrate than one in which older men predominate. Age-specific birthrates take into account such differences: for instance, the number of births per 1,000 women in the 25- to 34-year-old age group.

Crude birthrates are useful for making overall comparisons among different groups, societies, and regions. The crude birthrate for the world as a whole in 2021 was 17 per 1,000. For the United States, it was far lower, at 11 per 1,000. Other industrialized countries had even lower rates: for example, 7 per 1,000 in Spain and Italy, and 5 per 1,000 in South Korea. In many other parts of the world, crude birthrates were much higher. In India, for instance, the crude birthrate was 168 per 1,000, and in many African nations, it was about 40 per 1,000. The crude birthrates in Niger and Somalia—45 and 44 per 1,000, respectively—were the world's highest in 2021 (World Bank, 2021a). In fact, the crude birthrate for low-income countries as a whole (35 per 1,000) is more than three times that of high-income countries (1 per 1,000), making the poorest countries the fastest-growing, with the youngest populations (World Bank, 2021a).

It is important to note that for the world as a whole, the crude birthrate has declined considerably over the past half century—from 36 per 1,000 in 1963 to 17 today (World Bank, 2021a). While this decrease in births suggests lower population growth and therefore reduced pressure on the environment, as we shall see below, declining global birthrates by themselves will not solve our environmental problems. Fertility refers to how many live-born children the average woman actually has, in contrast to the number that are biologically possible. (Social and cultural factors, including birth control practices, play a role in determining actual fertility.) A fertility rate is usually calculated as the average number of births per 1,000 women of childbearing age.

Crude death rates (also called *mortality rates*) are calculated in the same way as birthrates—the number of deaths per 1,000 of the population per year. Again, there are major variations among countries, but death rates in many societies in the Global South are falling to levels comparable to those of the West. The crude death rate for the world as a whole was 9 per 1,000 in 2021—a rate shared by many countries throughout the world, including Canada, Argentina, and some African countries such as Burundi and Zimbabwe (World Bank, 2022a). Perhaps surprisingly, the United States crude death rate in 2021, 10 per 1,000, is slightly higher than the world average (World Bank, 2022b). Both India and China had slightly lower crude death rates that same year (India with 9 per 1,000, and China with 7 per 1,000) (World Bank, 2022f). At the other extreme, Bulgaria, Latvia, Serbia, and Ukraine have the highest crude death rates, at 18 to 22 per 1,000 (World Bank, 2022f). A high crude death rate can result from many factors, with poverty—and the poor health care that often goes along with it—being a major cause. But HIV/AIDS, warfare, drugs (such as opioids in the United States), and natural disasters also play a role. Crude death rates globally have fallen even more significantly than crude birthrates over the past half century, from 18 per 1,000 in 1960 to 9 per 1,000 in 2021 (World Bank, 2022f). While declining global mortality is obviously good news from the standpoint of public health (and personal suffering), there is one downside: Since global population growth necessarily results from the difference between births and deaths, the fact that the number of deaths has declined even more than the number of births is the reason that the world's population continues to grow, with resulting pressures on the environment.

Like crude birthrates, crude death rates provide only a very general index of mortality (the number of deaths in a population), and can be very misleading, since they do not reflect the age structure of a country: A country with an aging population will obviously have a higher mortality rate than a country with a younger population. For example, in 2021 mortality rates in the European Union (12 per 1,000) were twice those in the Middle East and North Africa (6 per 1,000), even though the European Union was and still is wealthier (and therefore healthier) than the Middle East and North Africa. The reason: In 2021, Europe had four times as many people over 65 (21 percent) than the Middle East and North Africa (5 percent) did (World Bank, 2022j).

A particularly important specific death rate is the infant mortality rate—the number of babies per 1,000 births in any year who die before reaching age one. One of the key factors underlying the population explosion has been the reduction in infant mortality rates. For the world as a whole, in 2021, out of every 1,000 births, 28 babies died in infancy, a significant drop over barely three decades (as recently as 1990, the rate was 65) (World Bank, 2022h). Also in 2021, infant mortality ranged from a low of 1 to 2 per 1,000 in countries such as Norway, Sweden, and Finland—three Scandinavian countries with strong public health care systems—to a high of 78 and 75, respectively, in the war-torn nations of Sierra Leone and the Central African Republic (World Bank, 2022h). The infant mortality rate in the United States—5 per 1,000 in 2021—is at the low end, but it's not as low as in high-income countries as a whole or, for that matter, Cuba (both are 4 per 1,000) (World Bank, 2022h). Although Cuba is a poor (and undemocratic) country, its government has made preventive medicine, including a strong primary health care system, one of its top priorities (Etienne, 2018).

Declining rates of infant mortality are the most important influence on increasing life expectancy—that is, the number of years the average person can expect to live. In 1900, life expectancy at birth in the United States was about 40 years. In 2021, it had increased to just over 76 years (World Bank, 2022g). This does not mean, however, that most people at the turn of the century died when they were about 40 years of age. If we look at the life expectancy of those people who survive the first year of life, we find that in 1900 the average person could expect to live to age 58. Illness, nutrition, and natural disasters are the other factors influencing life expectancy. Life expectancy has to be distinguished from life span, which is the maximum number of years that an individual could live. Although life expectancy has increased in most societies in the world, life span has remained unaltered. Only a small proportion of people live to be 100 or more.

# Dynamics of Population Change

Rates of population growth or decline are measured by subtracting the yearly number of deaths per 1,000 from the number of births per 1,000. (Actual population growth or decline also requires taking into account the number of people who have migrated into the country, as well as the

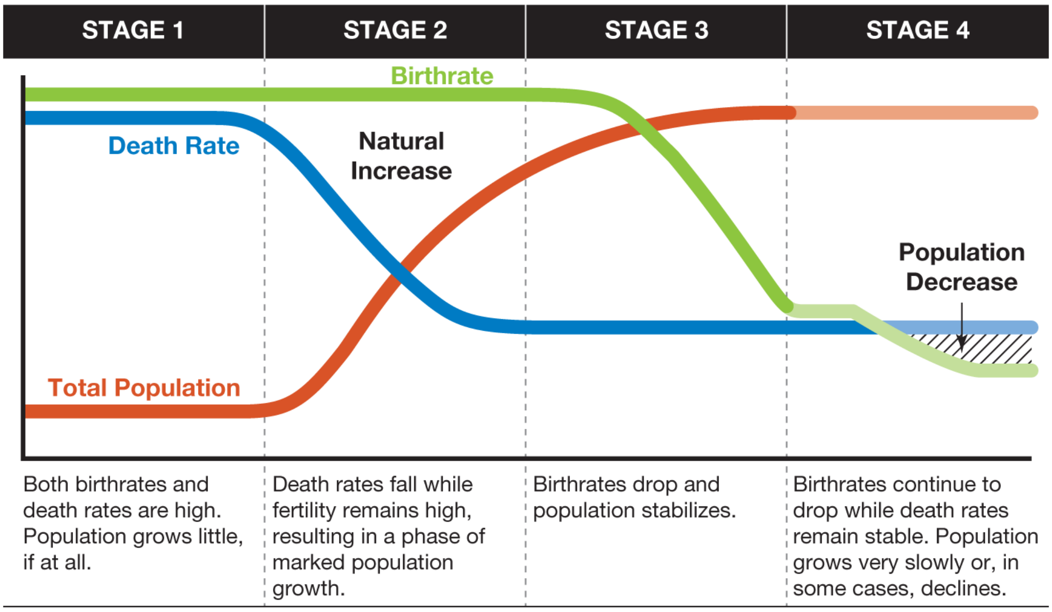
number who have emigrated out of the country.) For the world as a whole, population is increasing 0.8 percent each year as of 2022, which is nearly half the rate of 50 years ago (World Bank, 2022k). While this trend is certainly promising—the population explosion is clearly slowing—as we have seen, it will still result in several billion more people by the end of the century, if the predicted trends prove to be correct.

How can such a tiny rate of growth (0.8 percent each year) produce billions more people over the next 70 or so years? The answer is that population growth is exponential: People born today add to the total population, creating a larger base for future growth. Since today there are approximately 7.9 billion people in the world, and the annual growth rate is about 0.8 percent, then next year there will be 63.2 million more people (7,900,000,000 × 0.8 percent = 63,200,000), bringing the total to 7,963,200,000 (U.S. Bureau of the Census, 2023a; World Bank, 2022k). If this larger population base continues to grow at 0.8 percent each year, then two years from now, 63,705,600 more people will be added, and so on into the future. Each year, the number of people added will grow. We can measure this effect by means of the doubling time—the period of time it takes for the population to double. The formula used to calculate doubling time is 70 divided by the current growth rate. For example, a population growth of 1 percent will produce a doubling of numbers in 70 years. At 2 percent growth, a population will double in 35 years, while at 3 percent, it will double in 23 years.

Virtually all industrialized countries have growth rates less than 0.6 percent; for example, the rate of population growth for the European Union in 2022 was only 0.2 percent (doubling in 350 years); for the United States, it was 0.4 percent (doubling in 117 years) (World Bank, 2022k). While some countries have experienced population decline because of war or economic collapse (Syria and Venezuela are current examples), some advanced industrial countries, such as Japan and Italy (which each had a growth rate of –0.4 percent in 2022), have had declines for different reasons (World Bank, 2022k). In these countries, fertility has declined relative to mortality sufficiently that births (and net migration) no longer outnumber deaths. As we shall see, economic success appears to go hand in hand with declining population growth (and, at the extreme, even population decline).

Figure 19.1

## DEMOGRAPHIC TRANSITION




On the other hand, as previously noted, the poorest countries in the world have the highest crude birthrates and therefore the fastest-growing populations. The number of people in low-income countries grew 2.7 percent in 2022, meaning their populations will double in only 27 years (World Bank, 2022l). High birthrates also mean a youthful population: As of 2022, 42 percent of people living in low-income countries are under 14, compared with only 16 percent in high-income countries (World Bank, 2022i). In Niger, the world's "youngest country," almost half (49 percent) of the population is under 14 (World Bank, 2022i). A young, poor population creates numerous social and economic challenges: Educational opportunities are often nonexistent, and many children must work full-time, while others eke out a living as street children, begging for whatever they can. Large numbers of unemployed or underemployed young people, especially young men, are often a prescription for unrest, providing a recruiting ground for organizations that advocate for radical (and sometimes violent) change (Darden, 2019).

While poor countries consume far less than rich countries (and in that sense have less of an environmental impact), their more rapidly growing populations require additional resources. And to the extent that they successfully industrialize and improve their living standards, their environmental impacts will only increase, at least in the short run (in the

long run, successful industrialization may also result in slower population growth).

## The Demographic Transition

During the nineteenth century, successful industrialization and economic development in Europe and the United States did in fact result in slower population growth. This has been termed the demographic transition, a notion first worked out by Warren S. Thompson (1929), who described a three-stage process in which one type of population stability would eventually be replaced by another, as a society reached an advanced level of economic development.

*Stage one* refers to the conditions characteristic of most preindustrial societies, in which both birthrates and death rates are high and the infant mortality rate is especially high. Population grows little, if at all, as the high number of births is more or less offset by the large number of deaths. Although there are sometimes periods of marked population increase, these are followed by increases in death rates.

*Stage two*, which began with industrial development in Europe and the United States in the early part of the nineteenth century (with wide regional variations), occurs when death rates fall while fertility remains high. The death rates fall because of improved agriculture, resulting in more stable food supplies, as well as some advances in public health (such as water supplies, sewage and sanitation controls, and the growth of medical knowledge). Fertility initially remains high, however, because of cultural lag—long-standing beliefs and practices that support having large families are slow to change. This is, therefore, a phase of marked population growth. (Some scholars divide this stage into two phases, one in which birthrates remain high but death rates drop, and a second in which death rates also begin to decline).

*Stage three* occurs when cultural norms change from favoring high birthrates to instead favoring low birthrates. Once again, birthrates and death rates are aligned—this time both at low levels. Once again, population is stable. This transition is partly the result of the changing economics of having many children. As economies transitioned from agricultural to industrial, parents no longer required many children to help maintain their farms, although at least initially children could work

in factories. But as industrial economies matured, child labor was made illegal; instead, compulsory schooling meant that parents were expected to support their children throughout their school years—and sometimes even throughout their college years. Instead of being seen as an economic asset, children came to be viewed as an economic cost. Parents became increasingly concerned with "child quality" and providing resources to ensure the best possible life for their offspring, rather than "child quantity," or having many children.

Industrial development also was accompanied by technologies that allowed women to control their own fertility, as well as a cultural change regarding people's views toward childbearing. How many children a woman would have was now viewed as under her own control, rather than as a "gift from God." In contemporary society, as women have achieved higher levels of education and higher earnings in the labor market, the incentive to have fewer children has increased. Higher education among both men and women also is linked to delayed marriage and, consequently, delayed (and thus diminished) childbearing (Caldwell et al., 2010).

Demographers do not fully agree on how to interpret this sequence of change or how long-lasting stage three is likely to be. Fertility in the Western countries has not been completely stable over the past century or so; considerable differences in fertility remain among the industrialized nations, and among classes or regions within them. Nevertheless, it is generally accepted that this sequence accurately describes a major transformation in the demographic character of modern societies.

In recent decades, demographers have debated whether a "second demographic transition" has begun in the most developed industrial countries. Under this new model (see Figure 19.1), fertility rates continue to fall because of shifts in family structure. Key influences on the second demographic transition include delayed marriage; delayed childbearing; rising rates of cohabitation; high, steady rates of divorce; and the relative ease of obtaining effective means of birth control. All these factors arguably lead to lower birthrates, because under these circumstances many people may prefer not to have children (van de Kaa, 2003). This may account for the extremely low birthrates among advanced industrial societies. In fact, as we have previously seen, some countries appear to have moved into a fourth stage, in which birthrates decline below replacement levels; that is, mortality rates (which remain low) outstrip

fertility rates (which drop even lower than mortality rates), resulting in population decline.

The shift to still lower birthrates, and even population decline, has been the recent experience of many European countries as well as Japan and Singapore. A process of aging has resulted, in which the proportion of young people declines while the proportion of the elderly markedly increases. If this trend continues, it can have widespread economic and social implications for economically developed countries. First, there will be an increase in the dependency ratio, the ratio of economically dependent members (the older population) to economically productive members (younger working members) of the population. Economically dependent persons are those considered too young or too old to work, typically those under age 15 and over age 65. As the dependency ratio increases, pressure will mount on health care and social services—with relatively fewer persons working (and therefore able to pay the needed taxes) to finance them.

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**CONCEPT CHECKS**

1. **Why is demography considered a branch of sociology?**
2. **How does the age structure of a society affect fertility, mortality, and thereby population growth?**
3. **What are the stages of a demographic transition, and why do some demographers believe that we've now entered a fourth stage?**

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# Glossary

demography
: The study of populations.

crude birthrates
: Statistical measures representing the number of births within a given population per year, normally calculated in terms of the number of births per 1,000 members.

age-specific birthrates

Statistical measures representing the number of births within a given population per year in relation to age distribution.

fertility
: The average number of live-born children produced by women of childbearing age in a particular society.

crude death rates
: Statistical measures representing the number of deaths that occur annually in a given population, normally calculated as the ratio of deaths per 1,000 members. Crude death rates give a general indication of the mortality levels of a community or society, but they are limited in their usefulness because they do not take into account the age distribution.

mortality
: The number of deaths in a population.

infant mortality rate
: The number of infants who die during the first year of life, per 1,000 live births.

life expectancy
: The number of years the average person can expect to live.

life span
: The maximum length of life that is biologically possible for a member of a given species.

rates of population growth or decline
: A measurement of population change calculated by subtracting the yearly number of deaths per 1,000 from the number of births per 1,000.

exponential growth
: A geometric, rather than linear, rate of progression; producing a fast rise in the numbers of a population experiencing such growth.

doubling time
: The time it takes for a particular level of population to double.

demographic transition
: A theory that shows how birth and death rates are related to stages of industrial development, with high birth and death rates transitioning to low birth and death rates as a country transitions from a preindustrial to an industrialized economy.

second demographic transition
: A new demographic model that predicts that fertility rates will continue to fall because of shifts in family structure.

dependency ratio

The ratio of people of dependent ages (children and older adults) to people of economically active ages.

# 2 URBAN SOCIOLOGY: SOME INFLUENTIAL THEORIES

**Understand how theories of urbanism have placed an increasing emphasis on the influence of socioeconomic factors on city life.**

Urbanization—the movement of the population into towns and cities, away from rural farmland—results when cities grow in population, perhaps partly through natural increase but mainly through migration from rural areas by people in search of the economic opportunities associated with urban life. During the twentieth century, for the first time in history, humans opted for large-scale urban living rather than rural life. This change has had enormous consequences not only for individuals but for the planetary environment as well. Before we turn to some of these consequences, however, it is important to understand how sociologists have viewed urban life, since their perspectives played a major role in the emergence of the discipline during the twentieth century. We begin with scholars associated with the University of Chicago's so-called "Chicago School" from the 1920s to the 1940s—especially Robert Park, Ernest Burgess, and Louis Wirth—who developed ideas that were, for many years, the chief basis of theory and research in urban sociology. Some important ideas, however, came from outside universities—for example, from the work of Jane Jacobs, whom we will also consider. We will also examine some other leading theories of urban sociology, before examining city life throughout the world today.

## The Chicago School

Two concepts developed by the "Chicago School" are worthy of special attention. One is the so-called ecological approach to urban analysis (Park, 1952); the other is the characterization of urbanism as a *way of life*, developed by Wirth (1938). It is important to understand these ideas as the Chicago School initially conceived of them and to see how sociologists in more recent decades have revised and even replaced them.

## Urban Ecology

*Ecology*—the study of the adaptation of plant and animal organisms to their environment—is a term taken from the physical sciences. The Chicago School believed that cities grew and took shape by adapting to their environments, much as is the case with plants and animals. Large urban areas initially tend to develop along the shores of rivers, in fertile plains, or at the intersection of trading routes or railways. They then become ordered into "natural areas" through such seemingly natural processes as competition, invasion, and succession—a set of concepts taken directly from biological ecology. Much like plants and animals in a natural environment, different neighborhoods develop through the adjustments inhabitants make as they struggle to gain their livelihoods. The Chicago School sought to show that cities grew outward in concentric rings: In the center are the inner-city areas, a mixture of big-business prosperity and decaying private homes; beyond these are older established neighborhoods, housing workers employed in stable manual occupations; farther out still are the suburbs, in which higher-income groups tend to live. Processes of invasion and succession occur within the segments of the concentric rings. Thus, as property decays in a central or near-central area, ethnic minority groups might start to move into it. As they do so, more of the preexisting population starts to leave, precipitating a wholesale flight to neighborhoods elsewhere in the city or out to the suburbs. Within this larger framework, *differentiation* occurs—different groups will compete for space. For example, groups on which many others depend (banks, corporate headquarters, insurance companies) will have a dominant role, often reflected in their central geographical position; members of different ethnic groups may all live in certain neighborhoods, ranging from poor to wealthy depending on the fortunes of the group (Hawley, 1950, 1968). These processes were considered to be as immutable as the laws of nature, an assumption that might have provided some scientific credence to sociological reasoning, but that, as we shall see, often proved to be incorrect.

Robert Park of the Chicago School applied an ecological approach to urban analysis, arguing that, like natural organisms, cities such as Chicago sprout up in response to advantageous features of the environment.

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Cities are human made and are therefore shaped by human—and not natural—forces. The assumptions of human ecology were challenged when two Black graduate students, St. Clair Drake and Horace R. Cayton, challenged the assumptions of human ecology when they published their book *Black Metropolis*, based on extensive historical and ethnographic data (Drake & Cayton, 1945). Their research showed that Chicago's Black residential neighborhoods were ghettos, places where a racial or ethnic group initially comes to live as a consequence of systematic exclusion from more desirable places. Chicago's ghettos, they argued, were by no means the result of "natural forces" but were instead

shaped by unnatural social forces: Blacks had been given no choice but to live in the worst areas of the city. There was nothing natural about this placement, and it would not have occurred without social forces such as exclusion, violence, and restrictive covenants in which neighborhood "improvement" associations passed laws making it illegal to sell land in a community to Blacks. After the publication of Drake and Cayton's *Black Metropolis*, it was harder for sociologists to think of the distributions of populations in urban areas as natural.

Whether listening to music on portable devices or texting on their phones, many people have strategies for distancing themselves and managing social boundaries in busy urban environments.

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## Urbanism as a Way of Life

Wirth's thesis of urbanism as a *way of life* (1938) focuses on the ways that life in cities is different from life elsewhere but also helps shape life outside cities—for example, by influencing styles of dress and behavior. As a "way of life," however, cities are unique in that large numbers of people live in close proximity to one another in virtual anonymity, without knowing one another personally—a fundamental contrast to small, traditional villages. As a result, within cities most contact (for example, with salesclerks, baristas, passengers on trains) is fleeting and

partial, serving as a means to other ends, rather than being a satisfying relationship in itself. Given the fast pace of life, the bonds that unite people tend to be weak; competition prevails over cooperation. Yet at the same time, some neighborhoods—for example, immigrant enclaves—may preserve the characteristics of small communities. The more such areas are absorbed into wider patterns of city life, however, the less these characteristics survive.

Wirth was among the first to address the "urban interaction problem" (Duneier & Molotch, 1999), the necessity for city dwellers to respect social boundaries when so many people are in close physical proximity all the time. Wirth elaborates that "the reserve, the indifference, and the blasé outlook that urbanites manifest in their relationships may thus be regarded as devices for immunizing themselves against the personal claims and expectations of others." Many people walk down the street in cities acting unconcerned about the others near them, often talking on cell phones or listening to music that blocks out the sounds of urban life. Through this appearance of apathy, they can avoid unwanted transgression of social boundaries.

Wirth's ideas have deservedly enjoyed wide currency. The impersonal nature of many day-to-day contacts in modern cities is undeniable, but to some degree, this is true of social life in general in modern societies: Even in rural areas, people must manage social boundaries in their face-to-face interactions with others, as has been found as far afield as in western Samoa (Duranti, 1994) or among the African Poro people (Bellman, 1984). Furthermore, neighborhoods marked by close kinship and personal ties are not only the result of immigrant groups seeking to preserve their ethnic ties or previous ways of living; they can also result from the interaction among people who share common interests, whether it be religion, politics, language, or art and culture. A small town or village does not easily allow the development of such subcultural diversity (Fischer, 1984). An artist might find few others in a village or small town with whom to associate but may find a community of like-minded artistic or intellectual peers in neighborhoods such as Williamsburg in Brooklyn, New York. Likewise, some gay and lesbian young people may find more hospitable communities in cities that have large gay subcultures, such as San Francisco, than in the small towns where they may have grown up.

A large city may be a world of strangers, yet it supports and creates personal relationships. It may be difficult to meet people when one first moves to a large city, but given the diversity of people in large cities, opportunities exist to seek out and befriend like-minded individuals. By contrast, one who moves to a small, established rural community may find one's neighbors to be friendly and polite, but it may take years to become truly accepted when one is "new" in town. Wirth's ideas retain some validity, but in light of subsequent contributions, they clearly are overgeneralized. Modern cities frequently involve impersonal, anonymous social relationships, but they are also sources of diversity—and, sometimes, intimacy.

# Jane Jacobs: "Eyes and Ears Upon the Street"

Like most sociologists in the twentieth century, the Chicago School researchers were professors who saw their mission as contributing to a scholarly literature and advancing the field of social science. At certain moments in the history of sociology, however, advances have also come from thinkers working outside universities without formal training in sociology. One such person was Jane Jacobs, who published *The Death and Life of Great American Cities* in 1961, and who emerged as a highly influential public intellectual who helped shape the field of urban studies.

Jacobs, like Wirth, noted that "cities are, by definition, full of strangers," some of whom are dangerous. She then tried to explain what makes it possible for cities to meet the challenge of "assimilating strangers" in such a way that strangers can feel comfortable together. She argued that cities are most habitable when they feature a diversity of uses, thereby ensuring that many people will be coming and going on the streets at any time. When enough people are out and about, Jacobs wrote, "respectable" eyes and ears dominate the street and are fixed on strangers, who will thus not get out of hand. Underneath the seeming disorder of a busy street is the very basis for order in "the intricacy of sidewalk use, bringing with it a constant succession of eyes." The more people who are out, or looking from their windows at the people who are out, the more their gazes will safeguard the street.

More than five decades after her book was published, Jacobs's ideas remain extremely influential. Yet times have changed since Jacobs's writing, and a great diversity of people are now found on city sidewalks, often representing economic inequalities, cultural differences, and extremes of behavior. From the homeless seeking a few dollars, to the mentally ill who have no other place to go, sidewalk life can often seem unpredictable and threatening (Duneier, 1999). Under these conditions, strangers do not necessarily feel the kind of solidarity and mutual assurance she described. Sociologists today must ask: What happens to urban life when "the eyes and ears upon the street" represent vast inequalities and cultural differences? Under what conditions do the assumptions Jacobs made still hold up?

# Urbanism and the Created Environment

Whereas the earlier Chicago School of sociology emphasized that the distribution of people in cities occurs naturally, scholars such as Drake and Cayton (1945) showed that there was nothing "natural" about the formation of ghettos, and more recent theories of the city have stressed that urbanism has to be analyzed in relation to larger patterns of political and economic change. This focus on the political economy of cities, and increasingly in a global context, represented a new and critical direction for urban sociology.

## Harvey: The Restructuring of Space

Urbanism is one aspect of the created environment brought about by the spread of industrial capitalism, according to David Harvey (1973, 1982, 1985, 2009). In traditional societies, city and countryside were clearly differentiated. In the modern world, industry blurs the division between city and countryside. Agriculture becomes mechanized and is run according to considerations of price and profit, just like industrial work, and this process lessens the differences in modes of social life between urban and rural people.

Harvey points out that in modern urbanism, space is continually *restructured*. The process is determined by decisions of large firms (where they choose to place their home offices, research and development centers, and factories); the controls that governments

operate over both land and industrial production; and the activities of private investors who buy and sell houses and land. Business firms, for example, are constantly weighing the relative advantages of new locations against existing ones. As production becomes cheaper in one area than another, or as the firm moves from one product to another, offices and factories will be closed down in one place and opened up elsewhere. Once the offices or factories have been built and the area redeveloped, investors will look for opportunities for further speculative building elsewhere. What is profitable in one period will not necessarily be so in another, when the financial climate changes.

The activities of private home buyers are strongly influenced by where business interests buy up land, and by rates of loans and taxes fixed by local and central government. After World War II, for instance, there was vast expansion of suburban development outside major U.S. cities. This expansion was due partly to ethnic discrimination and the tendency of Whites to move away from inner-city areas. However, it was made possible, Harvey argues, only because of government tax breaks to home buyers and construction firms and because financial organizations set up special credit arrangements. These provided the basis for the building and buying of new homes on the peripheries of cities and, at the same time, promoted demand for industrial products such as the automobile.

## Castells: Urbanism and Social Movements

Like Harvey, Manuel Castells (1977, 1983) argues that cities are almost wholly artificial environments, constructed by people rather than by the natural forces emphasized by the Chicago School. Both also stress that the spatial form of a society is closely linked to the larger political economy. Castells, however, also focuses on the collective consumption that cities make possible, such as the buying and selling of property. Homes, schools, transport services, and leisure amenities are ways in which people consume the products of modern industry. Large corporations, banks, and insurance companies, which provide capital for building projects, have a great deal of power over these processes; government agencies also directly affect many aspects of city life, by building roads and public housing, planning parks, and establishing tax policies and development subsidies. The physical shape of cities is thus a product of both market forces and the power of government.

But the nature of the created environment is not just the result of the activities of wealthy and powerful people. Castells stresses the importance of the struggles of underprivileged groups to alter their living conditions. Urban problems stimulate a range of social movements concerned with improving housing conditions, protesting against air pollution, defending parks, and combating building development that changes the nature of an area. For example, Castells studied the 1970s gay movement in San Francisco, which succeeded in restructuring neighborhoods around its own cultural values—allowing many gay organizations, clubs, and bars to flourish—and gained influence over local politics.

The Castro district in San Francisco is not only open but celebratory about its thriving gay and lesbian population.

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John Logan and Harvey Molotch (1987) have suggested an approach that directly connects the perspectives of authors such as Harvey and Castells with some features of the ecological standpoint. They agree with Harvey and Castells that broad features of economic development, stretching nationally and internationally, affect urban life in a quite direct way. But

these wide-ranging economic factors, they argue, are focused through local organizations, including neighborhood businesses, banks, and government agencies, together with the activities of individual home buyers. Places (land and buildings) are bought and sold, according to Logan and Molotch, just like other goods in modern societies, but the markets that structure city environments are influenced by how different groups of people want to use the property they buy and sell. Many tensions and conflicts arise as a result of this process—and these are the key factors structuring city neighborhoods. For instance, an apartment house is seen as a home by its residents but as a source of income by its landlord. Businesses are most interested in buying and selling property in an area to obtain the best production sites or to make profits in land speculation. Their interests and concerns are quite different from those of residents, for whom the neighborhood is a place to live.

# Saskia Sassen: Global Cities

Saskia Sassen has been one of the leading contributors to theoretical debates on cities and globalization. She shows how globalization is transforming cities into vital hubs within the global economy. Urban centers have become critical in coordinating information flows, managing business activities, and innovating new services and technologies. As business, production, advertising, and marketing assume a global scale, an enormous amount of organizational activity must be performed to maintain and develop these global networks. Power has been dispersed around the globe, concentrated in what Sassen (1991, 1998) terms global cities. These are urban centers that are home to the headquarters of large transnational corporations and a superabundance of financial, technological, and consulting services. In her early work, Sassen (1991) focuses on three such cities: New York, London, and Tokyo. The contemporary development of the world economy, she argues, has created a novel, strategic role for major cities. Most such cities have long been centers of international trade, but they now have four new traits:

1. They have developed into command posts—centers of direction and policy making—for the global economy.
2. They are the key locations for financial and specialized service firms, which have become more important than manufacturing in influencing economic development.

3. They are the sites of production and innovation in these newly expanded industries.
4. They are markets in which the “products” of financial and service industries are bought, sold, or otherwise disposed of.

Within the highly dispersed world economy of today, cities such as these provide for central control of the specialized services business organizations require for administering offices and factories scattered across the world, and of financial innovations and markets. Services and financial goods are the “things” the global city makes. In the downtown areas of global cities, local firms mingle with national and multinational organizations, including a multiplicity of foreign companies. Global cities compete with one another, but they also constitute an interdependent system, partly separate from the nations in which they are located. Sassen (1998) further argues that global cities have produced a new, interrelated dynamic of inequality: a prosperous central business district interlinked with a nearby impoverished area. The growth sectors of the new economy—financial services, marketing, high technology—are reaping profits far greater than any found within traditional economic sectors. As the salaries and bonuses of the very affluent continue to climb, the wages of those employed to clean and guard their offices are dropping. Sassen argues that we are witnessing the “valorization” of work located at the forefront of the new global economy, along with the “devalorization” of work that occurs behind the scenes. A geography of “centrality and marginality” is taking shape, as Mitch Duneier’s (1999) study in New York’s Greenwich Village revealed. Alongside resplendent affluence there is acute poverty. Yet although these two worlds coexist side by side, the actual contact between them can be surprisingly minimal. As Mike Davis (1990) noted in his study of Los Angeles, there has been a “conscious ‘hardening’ of the city surface against the poor.” Walled compounds, neighborhoods guarded by electronic surveillance, and “corporate citadels” have replaced accessible public spaces.

Sassen and others have built on her earlier work, noting that as globalization progresses, more and more cities are joining New York, London, and Tokyo in the ranks of the global cities, with places such as Chicago, Frankfurt, Hong Kong, Los Angeles, Milan, Osaka, Singapore, and Zurich serving as major global centers for business and financial services. Beneath these, new sets of regional centers are developing as key nodes within the global economy. Cities such as Buenos Aires,

Jakarta, Madrid, Moscow, São Paulo, and Seoul are becoming important hubs for activity within the so-called emerging markets.

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**CONCEPT CHECKS**

1. **How does urban ecology use language from the physical sciences to explain life in modern cities? How did Drake and Cayton's study challenge the ideas of urban ecology?**
2. **What is the urban interaction problem?**
3. **According to Jane Jacobs, the more people there are on the streets, the safer the streets will be. Do you agree with Jacobs's hypothesis and her explanation for this proposed pattern?**
4. **What are the four main characteristics of global cities?**

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# Glossary

urbanization
: The movement of the population into towns and cities and away from rural areas.

ecological approach
: In the field of urban analysis, a perspective emphasizing the "natural" distribution of city neighborhoods into areas having contrasting characteristics.

inner city
: The areas composing the central neighborhoods of a city, as distinct from the suburbs. In many modern urban settings in the developed world, inner-city areas are subject to dilapidation and decay, with the more affluent residents having moved to outlying areas.

ghetto
: A place where a racial or ethnic group initially comes to live as a consequence of systematic exclusion from more desirable places.

urbanism
: A term used by Louis Wirth to denote distinctive characteristics of urban social life, such as its impersonality.

created environment
: An environment made up of constructions established by human beings to serve their needs, derived from the use of human-made

technology—including, for example, roads, railways, factories, offices, private homes, and other buildings.

collective consumption

A concept used by Manuel Castells to refer to processes of urban consumption—such as the buying and selling of property.

global city

A city, such as London, New York, or Tokyo, that has become an organizing center of the new global economy.

# 3 POPULATION GROWTH, URBANIZATION, AND ENVIRONMENTAL CHALLENGES: RECENT RESEARCH

**See how the environment is a sociological issue related to industrialization, urbanization, and population growth.**

Since the beginning of the practice of agriculture thousands of years ago, human beings have left an imprint on nature. Hunting and gathering societies lived mainly in nature; they existed on what the natural environment provided and made little attempt to change the world around them. With the advent of agriculture, this situation was altered. For crops to grow, land must be cleared, trees cut down, and encroaching weeds and wild foliage kept at bay. Even primitive farming methods can lead to soil erosion. Once natural forests are cut down and clearings made, the wind may blow away the topsoil. The farming community then clears some fresh plots of land, and so the process goes on. Some landscapes that we today think of as natural, such as the rocky areas and scrubland in southwestern Greece, are actually the result of soil erosion farmers created 5,000 years ago.

Yet before the development of modern industry and its associated urbanization, nature dominated human life far more than human activities influenced nature. Today, the human onslaught on the environment is so intense that few natural processes are uninfluenced by human activity. Nearly all cultivable land is under agricultural production. What used to be almost inaccessible wildernesses are now often nature reserves, visited routinely by thousands of tourists. Modern industry, still expanding worldwide, has led to steeply climbing demands for sources of energy and raw materials. Yet the world's supply of such energy sources and raw materials is limited, and some key resources are bound to run out if global consumption is not restricted. Even the world's climate, as we shall see,

has been affected by global industrialization and economic growth—and the world's wealthiest countries have had the largest impact.

In this section we provide a brief history of urbanization across the globe, followed by an examination of recent urbanization in the United States and the Global South. We then turn to the major theme in this chapter: the effect of population growth, urbanization, and industrialization on our shared environment—the planet Earth.

# A Brief History of Urbanization

At the beginning of the twentieth century, fewer than one out of every seven people on the planet lived in cities. In 2022, more than half of the world's population (55 percent) lived in cities (World Bank, 2022e); by mid-century, more than two-thirds may be urban, with 90 percent of the increase taking place in Asia and Africa (UN DESA, 2018a). As population growth continues and globalization results in the spread of manufacturing throughout the world, we can expect the growth of cities, many of them gigantic in size, to continue.

## Premodern Cities

In premodern times, cities were self-contained entities that stood apart from the predominantly rural areas in which they were located. Road systems sometimes linked major urban areas, but travel was a specialized affair for merchants, soldiers, and others who needed to cross distances with some regularity. Communication among cities was limited.

The world's first cities appeared at around 3500 B.C.E., in the river valleys of the Nile in Egypt, the Tigris and Euphrates in what is now Iraq, and the Indus in what is today Pakistan. Cities in traditional societies were very small by modern standards. Babylon, for example, one of the largest ancient Near Eastern cities, extended over an area of only 3.2 square miles and, at its height, around 2000 B.C.E., probably numbered no more than 15,000 to 20,000 people. Rome under Emperor Augustus in the first century B.C.E. was easily the largest premodern city outside China, with some 300,000 inhabitants—the population of Stockton, California, or Cincinnati, Ohio, today. Most cities of the ancient world shared certain features. They were surrounded by walls for the purposes of military defense. Their centers, often protected by a second inner wall, typically

featured a religious temple, a royal palace, government buildings, a public square, and a market (Fox, 1964; Sjoberg, 1960, 1963; Wheatley, 1971). The dwellings of the ruling class or elite tended to be concentrated in or near the center, while less-privileged groups lived closer to the city walls or sometimes outside them, moving inside if the city came under attack. Different ethnic and religious communities were often segregated in separate neighborhoods, where their members lived and worked; sometimes even these neighborhoods were walled. Lacking any form of mass printing, public officials had to shout at the tops of their voices to deliver pronouncements. "Streets" were usually strips of land on which no one had yet built. A few traditional civilizations boasted sophisticated road systems linking particular cities, but these existed mainly for military purposes, and transportation for the most part was slow and limited. Merchants and soldiers were the only people who regularly traveled over long distances. Sanitary conditions were rudimentary at best, with open sewers and animal excrement likely to be everywhere.

Although cities became the main centers for science, the arts, and cosmopolitan culture, their influence over the rest of the country was always weak. No more than a tiny proportion of the population lived in the cities, and the division between cities and the countryside was pronounced. By far the majority of people lived in small rural communities and rarely came into contact with more than the occasional state official or merchant from the towns.

## The Rise of the Megalopolis

Britain was the first society to undergo industrialization, beginning in the mid-eighteenth century. The process of industrialization generated increasing urbanization. In 1800, less than 20 percent of the British population lived in towns or cities with more than 10,000 inhabitants. By 1900, this proportion had risen to 74 percent. London held about 1.1 million people in 1800; by the beginning of the twentieth century, it had increased in size to a population of more than 7 million, making it the largest city ever seen in the world at that time. It was a vast manufacturing, commercial, and financial center at the heart of the still-expanding British Empire.

The urbanization of most other European countries and the United States took place somewhat later. When the American colonies declared independence in 1776, the largest city was Philadelphia, with a population

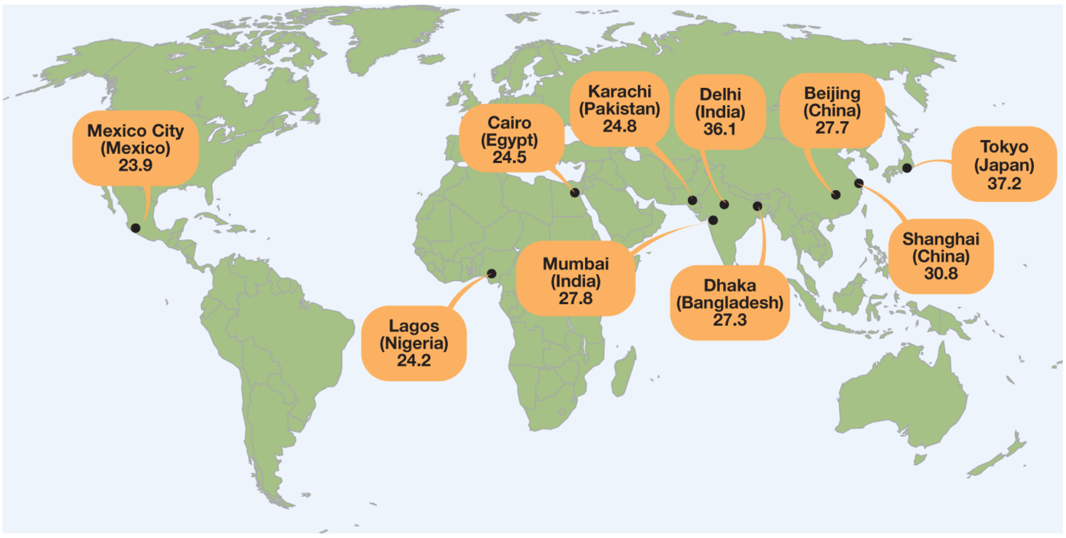
of only 40,000. By 1800, the United States was more of a rural society than were the leading European countries; fewer than 10 percent of Americans lived in communities with populations of more than 2,500 people. Between 1800 and 1900, as industrialization grew in the United States, the population of New York City leapt from 60,000 people to 4.8 million. It is currently the largest city in the United States at 8.4 million.

The contrast in size between the largest modern cities today and those of premodern civilizations is extraordinary. The most populous cities in the industrialized countries—sometimes termed "megacities"—number more than 10 million inhabitants. A conurbation—a cluster of cities and towns forming a continuous network—may include even larger numbers of people. The peak of urban life today is represented by what is called the megalopolis, the "city of cities." The term was first used in modern times to refer to the Northeast Corridor of the United States, an area covering some 450 miles from north of Boston to south of Washington, D.C. In this region, some 56 million people live at a density of more than 800 persons per square mile. Large, dense urban populations can also be found in the lower Great Lakes region surrounding Chicago.

Manuel Castells (1996) refers to megacities as one of the main features of third-millennium urbanization. They are global cities, functioning as population magnets for the countries or regions in which they are located. People are drawn to large urban areas for various reasons, including a desire to benefit from their global role, and there is evidence that at least some succeed: Average urban incomes are higher than those in rural areas, and there is usually better access to public services such as education, health, transportation, communication, water supply, and sanitation. Because of economies of scale, cities are better equipped to provide such services efficiently and cheaply to large, concentrated populations (UN Development Programme [UNDP], 2007). Yet at the same time, densely populated urban areas have proven to be fertile grounds for the spread of disease, as the deadly Covid-19 pandemic revealed: By the end of May 2020, of the approximately 100,000 known Covid-related deaths that had occurred in the entire United States, a fifth (20,000) were in New York City (CDC, 2020c). However, this pattern shifted once the virus had penetrated every community in the United States: Rural areas, where there is generally less access to adequate health care, experienced higher rates of Covid-related deaths than large urban areas did (Paglino et al., 2023).

Global Map 19.1

**PROJECTED POPULATIONS OF THE TEN LARGEST CITIES IN 2030***




* In millions.

Source: UN DESA, 2016.

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Although there are exceptions, urbanization generally goes hand in hand with economic growth. The least urbanized countries are also low-income countries (where only 35 percent of the population lives in urban areas); next come the more urbanized middle-income countries (54 percent urban); high-income countries are the most urbanized (82 percent). With the exception of some small island nations (such as Gibraltar or Bermuda) and city-states (such as Monaco or Singapore), the most urbanized countries are Qatar (99 percent); Belgium (98 percent); Uruguay (96 percent); and Israel, Argentina, and Japan (about 92 percent). The United States, with 80 percent of the population in urban areas, is somewhat more urbanized than the European Union (75 percent) (U.S. Bureau of the Census, 2022k). The least urbanized countries are those in South Asia (36 percent urban), which is also one of the poorest regions in the world (World Bank, 2022e).

# Urbanization in the United States

One of the major changes in U.S. population distribution in the period since World War II is the movement of large parts of city populations to

urban areas, both large cities and newly constructed suburbs. At the same time, rural populations have continued to decline as young people seek richer professional and personal opportunities in our nation's large and small cities. We therefore begin with a discussion of rural America and suburbia before moving on to look at larger metropolitan areas.

## The Decline of Rural America?

Rural areas of the United States are defined by the U.S. Bureau of the Census as all places located outside urban areas. They typically have fewer than 2,500 people and are often areas where people live in open country. In the 1950s, rural areas were home to more than a third (36 percent) of the U.S. population; as of the most recent census (2020), that figure has declined to a fourth (20 percent), even though rural America contains most of the country's landmass (97 percent) (America Counts, 2017; Ratcliffe et al., 2016; U.S. Bureau of the Census, 2022k). Population decline in rural areas is the result of many factors: the mechanization of agriculture, which replaced more labor-intensive small family farms with large mechanized industrial farms; lack of economic opportunities, reflected in high rates of poverty; the attraction of urban lifestyles for younger people; and, in some regions, a dearth of natural amenities such as forests, lakes, or temperate winters. The outmigration of young people, in particular, has meant that fewer babies are born to replace the aging rural population (Johnson, 2006). As a result, many rural areas have disproportionately high numbers of older adults, a phenomenon called aging in place that explains the relatively old populations in rural areas in the Rust Belt (the area around the Great Lakes and upper Midwest that has lost industry) (McGranahan & Beale, 2002).

One out of every five rural children lives in poverty, a rate that is higher than the urban rate (one out of every six) (U.S. Department of Agriculture Economic Research Service, 2022). According to one report, of the 50 U.S. counties with the highest rates of poverty, 48 are rural (*The Atlantic*, 2016). Race also shapes rural poverty, just as it shapes urban poverty. Rural counties with the highest child-poverty rates often have majority non-White populations. These areas include Black-majority counties in the Mississippi Delta and counties in the Midwest and West that have large Native American populations, often dwelling on Indian reservations (O'Hare & Mather, 2008).

High rates of poverty in rural areas are associated with a host of other social problems. A large body of research has found that people who live in rural areas are beset with numerous health-related issues, such as disease and disability, obesity, injury, and chronic pain (Monnat & Pickett, 2011; Schiller et al., 2012). Partly as a result, life expectancies are shorter (Singh & Siahpush, 2014), and rates of alcohol- and drug-related mortality and suicide are higher (Hedegaard et al., 2018). Opioid addiction and abuse, a growing problem throughout the United States, were once thought to be especially prevalent in rural areas, although the most detailed study to date found that opioid-related deaths among non-Hispanic Whites were actually highest in large metropolitan counties, partly because opioids were more readily available there. While opioid deaths varied across rural counties, some of the highest rates in all U.S. counties were found in rural counties where mines had closed or other jobs were lost. The economic distress of those who remained behind, often coupled with family breakdown, went hand in hand with psychological distress; anxiety, despair, and hopelessness resulted in alcohol abuse, drug addiction, and suicide. It is important to emphasize that all rural life is not bleak; there are enormous variations among rural areas (Monnat, 2019).

About 19 percent of Americans live in rural areas, such as Hensley, West Virginia. According to the U.S. Census, rural areas are those with fewer than 2,500 people.

One indication that many rural areas still have strong appeal is that the decline in rural population leveled off in the last decade, and even experienced a period of growth in 2020–2021 as the pandemic drove migration from urban areas to rural areas (Davis et al., 2022). And some of the most rapidly growing counties in the United States are rural: Washington's Whitman County grew 10 percent between 2020 and 2022, partly driven by the return of college students to Washington State University (U.S. Bureau of the Census, 2023b). A recent poll, for example, found that more than a quarter of all respondents (31 percent) said they would choose a rural area (Saad, 2021a). Even more recently, however, preference for rural living was strongest (52 percent) among respondents over 55; respondents aged 18 to 34 overwhelmingly chose cities (33 percent) and their suburbs (27 percent) (Saad, 2021a). While city lights still hold their allure for younger people, this may change, as information technology increasingly provides the flexibility to work at home, even when that home is distant from the office.

## Suburbanization

In the United States, suburbanization—the massive development and inhabiting of towns surrounding a city—rapidly increased during the 1950s and 1960s, a time of great economic growth. During the postwar decade, the population in cities increased by 10 percent, whereas in the suburban areas, it grew by nearly half. A series of federal policies after World War II encouraged Americans to pursue the "American Dream": owning a house and a piece of land. The Federal Housing Administration (FHA) provided assistance in obtaining mortgage loans, making it possible in the early postwar period for families to buy housing in the suburbs for less than they would have paid for rent in the cities. The FHA did not offer financial assistance to improve older homes or to build new homes in the central areas of ethnically mixed cities; its large-scale aid went only to the builders and buyers of suburban housing. The FHA, together with the Veterans Administration, which provided assistance to returning soldiers, funded almost half of all suburban housing built during the 1950s and 1960s.

President Eisenhower oversaw the passage of the Federal-Aid Highway Act in 1956, authorizing $32 billion ($300 billion in today's dollars) to be used for building the National System of Interstate and Defense Highways. Gasoline taxes were also used to fund the emerging interstate highway system, which launched today's network of freeways and toll roads. The interstate highway system both resulted from and contributed to the

expansion of the automobile industry, as the two-car family became common. High-speed highways and the rapidly growing number of cars that came to rely on them provided a boost in the postwar economy. At the same time, they enabled families to move to lower-tax, less expensive suburbs, and drive to work in neighboring cities. As industries and services followed people to the suburbs, commuting between suburbs also became common. Suburbs eventually became more racially and ethnically diverse; by 2020, minorities constituted 45 percent of all suburban residents—close to their proportion of the overall U.S. population—although the fastest-growing, low-density, distant suburbs (so-called exurbs) remained largely White (Frey, 2022). Members of minority groups move to the suburbs for reasons similar to those of the residents who preceded them: better housing, schools, and amenities. Like the people who began the exodus to suburbia in the 1950s, they are mostly middle-class professionals.

Today, scholars debate whether the divide between "suburb" and "city" is meaningful, as many older suburbs, often on the fringes of major cities, share many characteristics that were once hallmarks of city life—pockets of poverty, an aging housing stock (occupied by aging residents), old infrastructure, growing immigrant populations, and little land left for new development that will generate property-tax revenue. These inner suburbs stand in stark contrast to outer suburbs that have new housing stock, expanses of open land, and populations that tend to be more racially and ethnically homogeneous. As a result, researchers increasingly use the term s*uburban area* or *metropolitan area* to describe regions that encompass central cities and their immediate outskirts. Between 2010 and 2018, metropolitan areas—encompassing center cities and their surrounding suburbs—grew by 19 million people (7.1 percent). Roughly 86 percent of the U.S. population now lives in metropolitan areas (some 281 million people) (U.S. Bureau of the Census, 2019f).

Suburban Levittown, New York, in the 1950s (left). A new housin
development in the exurb of Highland, California (right).

While the last several decades saw a movement from the cities to the suburbs, they also witnessed a shift in the regional distribution of the U.S. population from north to south and east to west. Between 2010 and 2018, regional growth was much more rapid in the South (8.6 percent) and West (8.2 percent) than in the Northeast (1.3 percent) and Midwest (2.0 percent). Overall, the South and West accounted for 88.4 percent of the total U.S. population growth between 2000 and 2010 (U.S. Bureau of the Census, 2019c).

## Urban Problems: Gentrification, Urban Renewal, and Racial Segregation

Beginning in the 1950s, many major U.S. cities—particularly in the Northwest and Midwest—began losing businesses, jobs, and middle-class residents, who fled to the suburbs. Millions of blue-collar jobs disappeared, which particularly affected the poorly educated, who were drawn mostly from minority groups. By the 1990s, an urban underclass had emerged, partly as the result of an economic transformation that was replacing manufacturing jobs with information economy jobs requiring new skills, or low-wage service sector employment (Kasarda, 1993).

William Julius Wilson (1991, 1996) has argued that the problems of the urban underclass grew out of this economic transformation.

More recently, there has been a revival of many central cities, as wealthier professionals in some regions have moved back into downtown areas. This revival has resulted in a process of gentrification whereby older, deteriorated housing and other buildings are renovated as more affluent groups move into an area. Such a renewal process is called *gentrification* because those areas or buildings become upgraded and return to the control of the urban "gentry"—high-income dwellers—rather than remaining in the hands of the poor. Gentrification sometimes results from market forces, as when wealthier newcomers buy up cheap, run-down properties and fix them up, resulting in neighborhood changes that attract other affluent buyers, in a cycle that eventually drives up housing prices and rents, forcing out the poor who can no longer afford housing costs. Gentrification is nothing new—30 years ago sociologist Elijah Anderson (1990) analyzed the effect of gentrification in a Philadelphia neighborhood. He found that many Black residences were condemned, forcing more than a thousand people to leave in search of more affordable neighborhoods. The White newcomers had come in search of cheap "antique" housing, closer access to their city-based jobs, and a trendy urban lifestyle. Over time, the neighborhood was gradually transformed into a White middle-class enclave.

Often gentrification results not purely from market forces but from government policies that put public funds into poor areas. Urban renewal (sometimes called *urban redevelopment*) is the process of renovating deteriorating neighborhoods by using public funds to renew old buildings and construct new ones, often through large-scale demolition of slum housing. While the twin processes of gentrification and urban renewal are not new, they gained force after World War II, in large part when the 1949 and 1954 Federal Housing Acts pumped billions of federal dollars into urban renewal programs in run-down urban areas, leading Black novelist James Baldwin to describe urban renewal as "Negro removal." The Federal-Aid Highway Act resulted in another form of slum clearance, since it enabled federal and state governments to build expressways through urban areas that were almost always occupied by low-income African Americans. Gentrification and urban renewal may have made downtown areas more desirable for affluent professionals, but they have driven out those who are unable to afford the higher housing costs, including many middle-class households. Areas that were especially hard-hit included

several major urban areas in California: San Francisco/Oakland/San Jose (home to Silicon Valley), Orange County, and San Diego (Trulia, 2016).

These economic changes and public policies also contributed to increased residential segregation of different racial and ethnic groups and social classes, as we saw in Chapter 11. Discriminatory practices by home sellers, real estate agents, and mortgage lending institutions further added to this pattern of segregation. One-quarter of the roughly 29 million African Americans living in the largest metropolitan areas are found in segregated neighborhoods, defined as neighborhoods where more than four out of every five residents are Black (Sauter & Frohlich, 2020). How can this be the case, when racial segregation was outlawed more than a half century ago by the 1968 Fair Housing Act?

While some may argue that this is because most people prefer to live in racially homogeneous neighborhoods populated by people similar to themselves, it turns out that racial segregation today is in large part the result of government housing policies that began during the Great Depression of the 1930s and continued for several decades after World War II. Richard Rothstein (2017) argues that housing built under the federal Public Works Administration was deliberately segregated, with most going to Whites. After World War II, the 1949 Housing Act provided Federal Housing Administration (FHA) guarantees for bank loans, enabling the construction of large-scale White-only housing developments, with deeds that prohibited resale to African Americans (so-called restrictive covenants). At the local level, African American neighborhoods were frequently rezoned to allow industrial (and often toxic) uses, effectively turning them into slums. These and other government policies enabled White working-class Americans to buy homes in decent neighborhoods at affordable prices, while consigning most African Americans to rental housing in substandard areas.

For his Pulitzer Prize–winning ethnography *Evicted: Power and Profit in the American City*, sociologist Matthew Desmond conducted participant observation research of the private housing market, illuminating the often exploitative relationship between landlords and their poor tenants.

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Over many decades, home ownership became the principal source of wealth for White Americans as their homes appreciated in value over time. Rothstein argues that this historical race-based denial of equal home-ownership opportunities resulted in an enormous racial wealth gap that persists today. While Black income is currently just over 60 percent of White income, Black wealth is only 8 percent of White wealth, making it more difficult for Blacks to buy homes at today's prices or afford to send their children to college (Bennett, 2022; Semega & Kollar, 2022a). These challenges are especially severe for low-income (and disproportionately minority) households, since there is an acute shortage of affordable rental units (National Low Income Housing Coalition, 2017). Moreover, the landlord-tenant relationship is often exploitative: In the absence of rent and eviction controls, landlords will charge whatever the market will bear, and can legally evict tenants for any (or no) reason—for example, to find tenants who can afford significant rent increases. Frequent evictions, requiring moves to new neighborhoods, can serve to undermine long-term

relations in low-income communities. The ties among the urban poor become weaker; the social ties that contribute to a healthy community become what sociologist Matthew Desmond (2016) has termed "disposable." Evictions can be highly destructive of individuals and communities; Desmond's work points to the central importance of affordable housing programs in a broad range of antipoverty policies.

## The Ghetto as a Social and Historical Problem

Many Americans mistakenly believe that *ghetto* means a place where African Americans or Latinos live, but the word originated in sixteenth-century Italy and applied to areas of Rome and Venice where Jews were forced to live by official decree, as a way of isolating them from mainstream Christian society.

Sociologists originally drew a distinction between ghettos on the one hand and slums on the other. Ghettos were residential zones where particular groups were forced to live, not necessarily because they were poor, but because they belonged to a particular ethnic or racial group viewed as inferior and therefore in need of being forcibly cordoned off by the wider society. Slums, on the other hand, were zones inhabited by poor people who couldn't afford to live elsewhere, including members of a dominant, nonstigmatized group, such as poor Whites in the United States. In recent years, many sociologists have started using the terms *ghetto* and *slum* interchangeably, but it is better to retain the analytical clarity inherent in the former distinction.

A crucial criterion for the definition of the ghetto is that the people who live there must have been forced to do so. Indeed, this was the situation of Blacks in the United States and Jews in Rome. In the United States, Blacks were forced to live in certain parts of the northern cities because of restrictive covenants that made it illegal to sell them land in particular neighborhoods. Jews were forced to live in ghettos because of decrees by the popes. During the fourteenth century, most Jews were also forced to wear insignias when they traveled outside the zones where they lived, to indicate that they were Jews.

Whereas the inhabitants of the original ghettos were given little choice of where they could live, inhabitants of today's ghettos may feel that they live in their highly segregated and impoverished neighborhoods by choice. Sociological studies have demonstrated over and again that when poor

people have an opportunity to move, they will often resist every chance to do so. This is not because they do not want to improve their life chances, but because they do not believe their lives would be better without the social networks and neighborhood institutions that sustain them, even in their poor and segregated neighborhoods.

Are ghettos necessarily zones for the economically marginalized and exploited populations of stigmatized people? Whereas the U.S. ghetto was used to warehouse a significant labor supply for growing factories during the two world wars, the Jewish ghetto of Venice did not originally seem to have such a mission. Jews were very successful, and they continued to have significant economic ties to the wider society long after they were ghettoized (Stow, 2000). Ultimately, laws were enacted that made it difficult for Jews to carry on their occupations, but these were not intrinsic to ghettoization.

There have been many ghettos in the history of the world, but there are no sociological studies that compare ghettos in more than a few societies. For this reason, there is still much to know about the characteristics that would define the ghetto concept. From what we know, a ghetto is a residential zone in which stigmatized racial or religious groups are compelled to live by the wider society.

This takes us to an example in the contemporary United States. When Hurricane Katrina struck New Orleans, Louisiana, in August 2005, the victims of the floods that ravaged the city in the storm's aftermath were mainly poor Blacks who lived in the most impoverished ghettos of the city. Why were these poor people disproportionately affected by the extreme weather conditions? The answer has mainly to do with the social and political history of these particular residential zones, which were always given fewer resources for drainage and pumping systems after past storms. It also has to do with the limited resources that poor people have to evacuate and the limited networks they have outside the zones where they live. By contrast with the poor Blacks who were trapped inside the ghettos as they flooded, many middle-class Whites had the resources and social connections to leave the city when warnings first appeared on the national news. The effect of Hurricane Katrina followed the fault lines of the larger urban problems that are associated with racial segregation and ghettoization in the inner cities today.

# Explosive Urbanization in the Global South

Most urban growth is now occurring in cities in the Global South, in regions with large populations. Africa remains mostly rural, with 58 percent of its 1.3 billion people still living in rural areas—a figure that rises to 72 percent in eastern Africa. Parts of Asia (a region that includes India, Bangladesh, Nepal, and Pakistan) also remain highly rural: Nearly two-thirds (64 percent) of South Asia's 1.9 billion people still live outside urban areas (UN DESA, 2018c). By mid-century, this is predicted to change dramatically. By 2050, 59 percent of all Africans and 54 percent of southern Asians will be living in urban areas—a rural-urban shift involving some 1.5 billion people in these two regions alone. For the less developed regions of the world as a whole (excluding China), the rural-urban shift is predicted to involve more than 2 billion people. These shifts will likely be due to two factors: The previously noted higher birthrates in poor countries, in urban as well as rural areas, and widespread *internal migration* from rural areas to urban ones, as rural poverty prompts many people to try their hand at city life. According to the World Bank (2017), urban areas account for roughly four-fifths of the world's gross domestic product. China is a case in point: Over the past three decades, as China transitioned from a largely impoverished country to the world's second-largest economy, it also transitioned from being 26 percent to 61 percent urban. In what is likely the largest internal migration in history, hundreds of millions of Chinese moved from farms and villages to giant cities, where jobs in factories and supporting services could be found (UN DESA, 2018b, 2018c).

There are currently 31 megacities with 10 million or more inhabitants, 24 of which are in the Global South, including Lagos, Nigeria. It is predicted that by 2030 there will be 43 megacities, each with more than 10 million people.

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Rapid urbanization in the Global South may provide the promise of work and a better life for many, but it has brought many problems as well. Factory jobs turn out to require endless hours, provide low pay, are completely lacking in basic workers' rights, and involve extremely hazardous working conditions. To take one example, over the past couple of decades, more than 2,000 factory workers have perished in fires and building collapses in Bangladesh, a country that has emerged as a major source of garment manufacturing (Appelbaum & Lichtenstein, 2016). Because the number of people migrating to cities often exceeds the number of available jobs, an informal economy emerges consisting of unregulated work done for cash "off the books"; such labor keeps workers barely a step above poverty (see Chapter 14). In India, for example, the informal economy accounts for 84 percent of nonagricultural employment (International Labour Organization, 2013). While such work may be important for helping thousands of families (and women especially) to survive in urban conditions, it is often harsh and exploitative. And since it is off the books, it is also untaxed, denying the state badly needed revenues.

Residents of South New Delhi, India, collect water from a government water tank. Access to safe water supplies is a chronic problem in urban areas of the Global South.

Another problem of rapid urbanization in the Global South is housing: As many as a billion people are now forced to live in makeshift shantytowns and squatter settlements on the fringes of megacities, resulting in what urban historian Mike Davis (2006) has graphically described as a "planet of slums." Brazil's two largest cities, Rio de Janeiro and São Paulo, house millions of people in makeshift hillside shantytowns called *favelas*; it is estimated that in Rio alone, nearly a quarter of the city's 6 million residents live in roughly a thousand such communities. While some *favelas* are notorious for being dangerous, crime-ridden places that lack adequate water, sanitation, and basic urban services, many serve as functioning communities for the city's urban poor, the only housing that they can afford (Catalytic Communities, 2015). Living in even crime-ridden shantytowns is preferable to the only alternative that many urban poor face: living on the streets.

# The Environment: A Sociological Issue

The environment is a central concern for sociology. The growing human population, industrialization, and the concentration of people in enormous

metropolitan areas have resulted in environmental challenges that play out on a planetary scale. Earth system scientists now agree: Humans play a starring role in global warming and climate change. Sociologists therefore have a role to play in understanding how social behavior may determine the environmental fate of the planet.

## The New Ecological Paradigm in Sociology

A change in thinking about human–environmental relations emerged in the 1970s. Classical sociology had tended to minimize, if not completely ignore, the importance of human impacts on the environment. This was partly because the negative impacts were less pervasive (by 1900 there were still fewer than 2 billion people in the world), but primarily because sociology, like most social scientists, generally took for granted human domination of nature (Leiss, 1994).

As we saw in Chapter 1, sociology emerged during the late nineteenth and early twentieth centuries, a period that reflected what has been termed "optimistic ethnocentrism" during an "age of exuberance" (Catton & Dunlap, 1980). This refers to the belief that science, technology, and industrial development, fueled by vast lands and resources in North and South America, as well as a seemingly endless supply of fossil fuel, would provide for limitless opportunity and endless progress. This view has been termed the *human exceptionalism paradigm* (HEP), reflecting the belief that humans are unique among all creatures: We dominate all species and can remake the world to serve our needs, since human destiny is shaped by social and cultural factors and not the physical environment (Catton & Dunlap, 1980).

This view held sway until the early 1970s, when it was seriously challenged by a growing number of sociologists and ecologists. This was a period during which social movements were already questioning prevailing worldviews, including the taken-for-granted assumption that human life could somehow be divorced from the natural world. The HEP was further challenged when an offshore oil-drilling platform in the Santa Barbara Channel in California blew out in early 1969, covering miles of pristine coastline with oil, killing thousands of birds, and creating what was at that time the largest ecological disaster in U.S. history. The oil spill received widespread media attention; President Nixon even paid a visit. It inspired the first Earth Day, as well as one of the country's first environmental studies programs, at UC Santa Barbara. The oil spill also highlighted the

tensions between the petroleum industry and local residents, raising questions about the nature of power in America (Molotch, 1970). Popular books such as Rachel Carson's *Silent Spring* (1962), which exposed the effects of pesticides on water, had already raised public awareness about environmental issues. The Club of Rome's *Limits to Growth* study (Meadows et al., 1972), which used computer modeling to analyze the complex interaction among such factors as population, food production, industrialization, capital flows, pollution, and natural resources, predicted global economic and demographic collapse before the year 2100.

The change in thinking about human–environmental relations that emerged in the 1970s was labeled the new ecological paradigm (NEP), a framework that emphasized the complex interactions involved in global ecosystems. Humans, it argued, are not somehow exempt from the "web of nature," and our biophysical environment is not limitless. On the contrary, the carrying capacity of our planet is limited, and we must come to understand and respect these limits, or we will pay a price (Buttel, 1987; Catton & Dunlap, 1980; Dunlap, 2002; Freudenburg et al., 1995; Schnaiberg, 1980).

Sociologist Allen Schnaiberg's influential book, *The Environment: From Surplus to Scarcity* (1980), argued that in the post–World War II period, capitalism's profit-driven need to produce and sell more and more products had resulted in an ever-expanding global demand for natural resources and cheap labor. The resulting adverse environmental impacts were seen as especially harmful in developing countries, where natural resources and cheap labor are found and extracted by firms in wealthy industrial countries. Rich countries therefore export their pollution and natural resource depletion to poor, less developed ones. Economics trumps ecology; labor, capital, and states all share an interest in economic expansion and interact in a system bent on ecological degradation. As technological innovation speeds the process, natural resources are depleted and environmental destruction becomes widespread, causing what Schnaiberg referred to as a "treadmill of production" that increases in speed with ever-diminished returns, resulting in toxic planetary ecological effects.

Schnaiberg's work is credited with creating the field of environmental sociology (Gould et al., 2004, 2008; Islam & Hossain, 2015), which is concerned with examining the relationships between social systems and the ecosphere. Environmental sociologists study such areas as the origins and impacts of technology, the relationship between social change and

environmental change, and the role of social inequality and power relationships in shaping human interactions with the environment (American Sociological Association, 2019). The once-radical ideas of the early environmental sociologists have by now become mainstream in environmental sociology (Pellow & Brehm, 2013, 2015).

The new ecological paradigm challenged another sociological theory about human–environmental relations that emerged at roughly the same time, Ecological Modernization Theory. Just as classical modernization theory (discussed in Chapter 9) argued that when poor countries pursue certain economic and technological policies they can find a path to economic development, Ecological Modernization Theory argued that when poor countries develop economically, they also turn a corner and reduce their environmental impact. This notion is embodied in the so-called Environmental Kuznets Curve, which predicts that during early stages of economic development, economic growth (measured, for example, by a country's per capita income) results in environmental degradation, but that when a certain level of development is reached, policies and technologies are adopted that reduce environmental impact. The Environmental Kuznets Curve, like the original Kuznets curve (discussed in Chapter 8), thus indicates that a form of inequality increases during early stages of capitalist economic development, then declines at later stages—in this case, environmental inequality rather than income inequality (Dinda, 2004). Although the new ecological paradigm viewed economic degradation as a largely inevitable result of capitalism, Ecological Modernization Theory argued that a combination of scientific and technological advances, market reforms, new forms of governance, and social movements could make a difference (Jänicke, 1991; Jänicke & Weidner, 1995; Mol & Sonnenfeld, 2000; Neale, 1997; Spaargaren & Mol, 1992). The former called for radical changes in existing economic systems; the latter favored reforms, possibly in part because its early advocates were largely from Europe, where national policies tended to be more disposed toward environmental protection than U.S. policies were.

## Global Environmental Threats

The spread of industrial production may already have done irreparable damage to the environment. Ecological questions concern not only how we can best cope with and contain environmental damage but also how the very ways of life within industrialized societies must change. Economic development in many countries has meant that more people are living

under better conditions than a half century ago, thanks to rising levels of consumption: As living standards rise, people are able to afford more food, clothing, personal items, leisure time, vacations, cars, and travel, and all the goods and services associated with middle-class life. But rapidly expanding global consumption requires energy to produce and transport goods, which pollutes the environment. During the 20-year period from 1997 to 2017, per person income, one measure of consumption, in the world as a whole increased by nearly 40 percent. In China, now the world's second-largest economy, per person income increased more than fourfold during the same period (World Bank, 2019b). If China, with nearly a fifth of the world population, reaches its understandable goal of achieving economic parity with the United States and other advanced industrial countries, the environmental impact of such massive consumption could be extreme.

According to one popular website, Global Footprint Network, if all people on earth were somehow to achieve the standard of living of the average American, it would require seven planets to feed, clothe, shelter, and provide the countless consumer items that make up what most of us consider a decent life. While such calculations are perhaps somewhat fanciful, the overall message is not: Our current path, whether as a nation or as all humanity, is no longer sustainable. Technological progress is, of course, unpredictable, and it may be that the earth will, in fact, yield sufficient resources to permit global industrialization without this resulting in irreversible ecological changes to the planet. At the moment, however, this does not seem feasible, and if the countries in the Global South are to achieve living standards comparable to those currently enjoyed in the West, global readjustments will be necessary.

Global environmental threats are of several basic sorts: global warming and climate change, the loss of biodiversity, food insecurity, and environmental injustice. We will look at each of these in turn, before turning to a consideration of what is being done to address them.

## Global Warming and Climate Change: Welcome to the Anthropocene

There is consensus in the scientific community that the earth is getting warmer, even more quickly than was believed to be the case a decade ago,

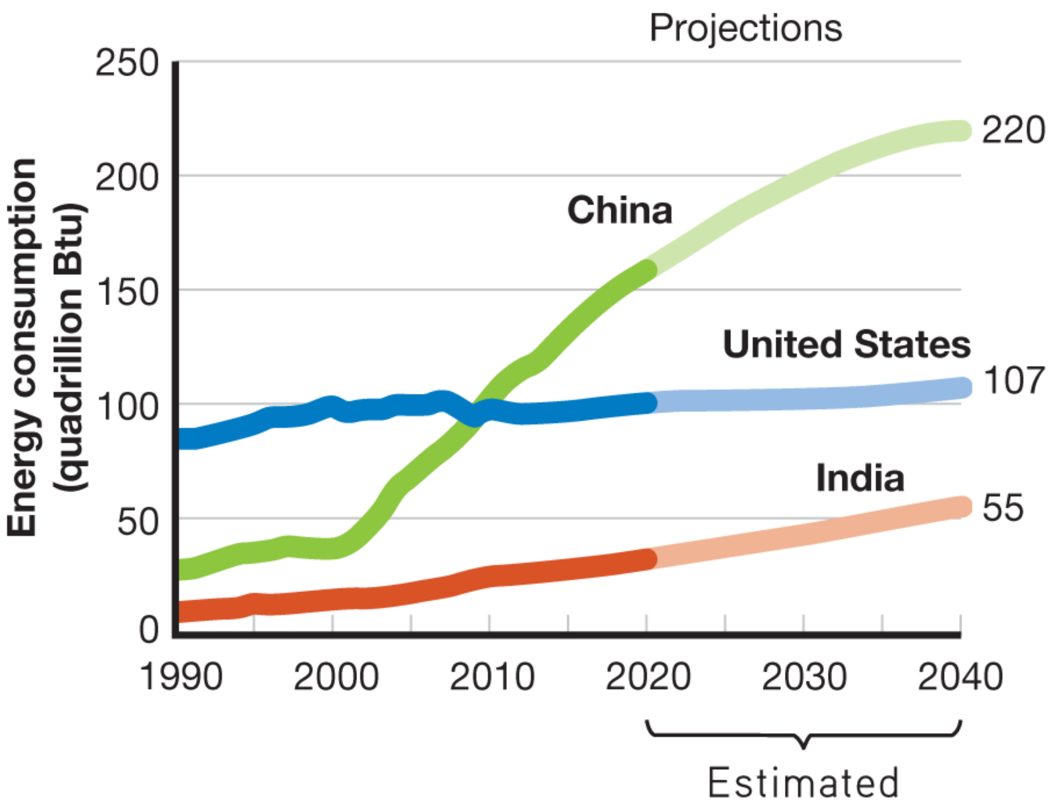
and that the human use of energy—coal, oil, and gas—is largely responsible.

Global warming occurs due to the high levels of carbon dioxide, methane, and other greenhouse gases in the atmosphere. Burning fuels such as oil and coal in cars and power stations releases greenhouse gases, as does using aerosol cans, insulation material, and air-conditioning units. This buildup of greenhouse gases in the earth's atmosphere functions like the glass of a greenhouse. The atmosphere allows the sun's rays to pass through but acts as a barrier to prevent the rays from passing back, causing the earth to heat up. For this reason, global warming is sometimes termed the "greenhouse effect." Atmospheric carbon dioxide, which has been increasing since the Industrial Revolution, has risen steeply in the last half century, and now exceeds 400 parts per million (climate scientists believe that once carbon dioxide levels reach 450 parts per million, it will be extremely difficult, if not impossible, to keep global temperatures from increasing more than 2 degrees Celsius). It is estimated that nearly half (47 percent) of atmospheric carbon dioxide has resulted from human activities since the Industrial Revolution, with more than half of all industrial emissions reportedly occurring in the last 30 years (Friedlingstein et al., 2019; Frumhoff, 2014).

The U.S. Energy Information Administration (EIA, 2019) has projected that worldwide energy use will increase by nearly 50 percent between 2012 and 2040, and more than half of that increase will occur in China and India. In 2010, those two countries accounted for 24 percent of the total growth in energy use. If current trends continue, the EIA predicts that by 2040, China will be using more than twice the energy of the United States (**Figure 19.2**). Despite breakthroughs in renewable energy, it is predicted that fossil fuels will still constitute more than three-quarters of global energy consumption.

Figure 19.2

**ENERGY CONSUMPTION, 1990–2040**




Source: U.S. EIA, 2019.

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Most of America’s energy currently comes from nonrenewable fossil fuels—mainly petroleum and, to a lesser degree, coal and natural gas. According to U.S. government figures, the United States consumes 21 percent of the world’s petroleum, 21 percent of its natural gas, and 6 percent of its coal, and produces 14 percent of all carbon emissions that result from fossil-fuel consumption (U.S. EIA, 2021). Since the United States has less than 5 percent of the world’s population, it is clearly consuming a greatly enlarged share of global energy reserves. This is what sociologist Bill Freudenburg (2006) termed the *disproportionality thesis*, according to which a vastly disproportionate amount of environmental harm is being done by a small number of countries, in which the United States is a principal actor.

While China’s growth is predicted to greatly increase its use of energy, it is currently second to the United States, consuming 15 percent of the world’s petroleum (U.S. EIA, 2023). Unlike the United States, China relies heavily on coal, which produces more carbon dioxide than petroleum to produce the same amount of energy, although it is in the process of shutting down its most polluting coal plants and switching to “clean coal” as well as

renewables. When all greenhouse gases are taken into account, China surpassed the United States as the world's largest emitter in 2005, and currently accounts for 32 percent of the world total, twice the share of the United States (14 percent) (U.S., EIA, 2023). Yet when making comparisons, it is important to bear in mind that China is an industrializing country whose population is four times the size of the U.S. population. On a per person basis, the United States is by far the world's largest producer of greenhouse gases: It currently emits twice as much carbon dioxide per person as China does (Olivier & Peters, 2018). Also recall that China's greenhouse gas emissions come in large part from factories that are making products that we all consume, for firms that are headquartered in the United States, Europe, and Japan. In an important sense, therefore, the production of greenhouse gases has been outsourced to firms in China as well as other industrializing countries.

In 2007, the Intergovernmental Panel on Climate Change (IPCC), a blue-ribbon group of scientists from 195 countries created by the United Nations Development Programme (UNDP) and the United Nations' World Meteorological Organization in 1988, took the planet's temperature and found it had already increased by 1 degree Celsius (1.8 degrees Fahrenheit) since preindustrial times (the period 1850–1900 is used as an approximation) and has been rising steeply since the mid-twentieth century. Rising temperatures result in the rapid shrinking of Arctic ice caps, along with mountain glaciers; long-term droughts in some regions, with greater rainfall in others; an increase in hurricane activity in the North Atlantic; and, in general, more turbulence in global weather. Most significantly, the 2007 IPCC report stated unequivocally that human activity was the principal source of global warming, very likely causing most of the temperature increase over the last century.

By 2014, when the IPCC issued its synthesis report based on the most recent research, the experts warned of "severe, pervasive, and irreversible impacts for people and ecosystems," including continued global warming to 2 degrees Celsius (3.6 degrees Fahrenheit) by the end of the century, more frequent and longer-lasting heat waves, and more extreme weather such as tropical storms, cyclones, and hurricanes. The best hope was to limit the total increase to no more than 1.5 degrees Celsius (2.7 degrees Fahrenheit) from preindustrial levels, which meant only another 0.5 degree Celsius (0.9 degree Fahrenheit) from current levels (IPCC, 2015). The 2014 IPCC report suggested ways to mitigate the worst consequences of global warming. The first and most important step would be for the

countries of the world to adopt conservation measures that would limit global warming to no more than 2 degrees Celsius (and, as noted above, 1.5 degrees Celsius is necessary if major climate changes are to be avoided). This would require national policies that reduce greenhouse gas emissions, which in turn would require massive conversion from economies based on fossil fuels to economies based on clean energy. In December 2015, 195 nations met in Paris and reached an agreement to limit temperature increase to no more than 1.5 degrees Celsius (2.7 degrees Fahrenheit). Each country agreed to submit a climate plan. The United States, for example, committed to a 2025 goal of greenhouse gas emissions 26 percent to 28 percent lower than they were in 2005. China took a somewhat different approach, pledging to lower emissions per unit of GDP by 60 to 65 percent (which would mean total emissions would continue to rise at least until 2030, since China hopes to continue building its rapidly growing GDP). The Paris Agreement also included a "loss and damage" principle, under which wealthy countries agreed to create a fund to help poorer countries cope with the effects of global warming (UN Framework Convention on Climate Change, 2015).

While the Paris Agreement was historically significant and was seen by many as a hopeful sign, it is unclear whether it will be honored. There are no enforcement mechanisms, apart from regular public reports that may shame countries into fulfilling their commitments. The IPCC, in its October 2018 Special Report, expressed grave concerns, commenting "that we are already seeing the consequences of 1°C of global warming through more extreme weather, rising sea levels and diminishing Arctic sea ice, among other changes." The report also noted that greenhouse gas emissions continue to rise, despite pledges from virtually every country to lower them, and that substantial action by governments and the private sector is required if the goal of limiting temperature increase to 1.5 degrees Celsius is to be realized. The report gave the world less than a dozen years (until 2030) to achieve the 1.5-degree-Celsius goal, after which it predicted far greater risks of droughts, floods, and extreme heat waves, all of which could result in poverty for hundreds of millions of people (Watts, 2018). "Now more than ever," the IPCC report concludes, "unprecedented and urgent action is required of all nations" if the world is to avoid extreme hot days, an increase in heavy rainfalls and flooding in some areas and prolonged droughts in others, stronger melting of ice sheets and glaciers, and a resulting rise in sea levels (IPCC, 2018).

A separate IPCC report on the oceans, glaciers, and permafrost, published a year later, noted a significant shrinkage of the earth's glaciers, snow cover, and Arctic sea ice; a warming of the oceans; and a melting of northern permafrost in recent decades (IPCC, 2019b). According to the report, melting glaciers have caused sea levels to rise more in the past century than at any time during the past several thousand years, resulting in coastal flooding. The predicted increase in average global temperature was sufficient, in the eyes of some scientists, to destabilize the ice sheets that cover Greenland and the western part of Antarctica; were they to melt in their entirety, sea levels would rise an estimated 30 feet or more. While such a catastrophic event seems unlikely in the foreseeable future, in 2019 the Greenland ice sheet lost 300 billion tons of ice, far more than normal, as a result of record hot weather during the summer months (National Snow and Ice Data Center, 2019; Tutton, 2019).

The report also noted an increase in tropical cyclones, rainfall, and winds from warming oceans; threats to ecologically (and economically) important animal plant species; wildfires in many regions; and negative impacts on food security and water. For the first time, the IPCC also emphasized the negative effects on Indigenous peoples, who depend most heavily on their natural surroundings for sustenance (IPCC, 2019b). The period 2015–2023 saw eight of the hottest years ever recorded; July 2023 was the hottest month since records have been kept (World Meteorological Organization, 2023). In the United States, wildfires now afflict large regions of the western United States and Hawaii, while storm surges and river flooding have plagued Houston, the North and Southeast, and the Midwest. While specific weather events cannot be definitively tied to global climate change, it seems increasingly likely that warmer weather is a major cause.

Such global warming, in combination with population growth and urbanization, can have deadly consequences. One study predicts that heat-related deaths in India will double by 2080, the direct result of global warming (*Economic Times*, 2015); another study drew similar conclusions for New York City (Freedman, 2013). In Pakistan, 1,250 people died during a heat wave in June 2015, and during spring 2016, Karachi—Pakistan's largest city, with more than 22 million people—began to run out of water, with people queuing up for hours for potable water that had to be brought in on trucks (Hashim, 2017). Nor is Pakistan alone; currently, two-thirds of the global population "live in areas that experience water scarcity for at least one month a year" (UNESCO, 2017). A November 2019 report

in the prestigious medical journal *Lancet*, that drew on the findings of 35 leading academic institutions and UN agencies from every continent, concluded that if present trends continue, "a child born today will experience a world that is more than four degrees warmer than the pre-industrial average, with climate change impacting human health from infancy and adolescence to adulthood and old age," noting that children and the 65+ population will suffer the greatest risks (Watts et al., 2019).

While climate skeptics claim that climate scientists overstate the case for climate change, in fact, the opposite is more likely: Advances in scientific knowledge and measurement have made it clear that the earliest scientific studies of climate change underestimated the rate of change (Linden, 2019; Oppenheimer et al., 2019; Oreskes et al., 2019). Debra Roberts, co-chair of the IPCC working group on impacts, warns that "it's a line in the sand and what it says to our species is that this is the moment and we must act now. . . . This is the largest clarion bell from the science community, and I hope it mobilizes people and dents the mood of complacency" (Watts, 2018). Such changes have led to the claim that we are now experiencing a "climate emergency" that must be urgently addressed (Gills & Morgan, 2020; IPCC, 2018; Watts, 2018).

Such dramatic climate changes, and the scientific consensus that they are the result of human activities, has led earth-system scientists to argue that we are now in a newly identified geological era: the Anthropocene (Oldfield et al., 2018). At the turn of the twenty-first century, Paul Crutzen, an atmospheric chemist and recipient of the Nobel Prize in Chemistry, popularized the term *Anthropocene* ("human epoch") to characterize the current geological period, a time when human activities have become the main agent of change in our planetary ecosystem (Crutzen & Stoermer, 2000). This label has caught on: The term has appeared in hundreds of scientific publications, and the International Union of Geological Sciences, the organization charged with identifying geological periods, has convened scholars to decide whether the Holocene (the period that began after the last ice age, some 12,000 years ago, providing the conditions under which modern human societies developed) has been officially superseded by the Anthropocene (Stromberg, 2013). The term is significant, because it reflects the overwhelming scientific consensus that humans have become the driving force behind global ecological change, and that global warming has significantly altered the conditions that gave rise to the agricultural revolution and modern societies. To understand the Anthropocene is to recognize that many different disciplines must work together, "from

engineering and environmental science to the social sciences and humanities" (Oldfield et al., 2018).

## Loss of Biodiversity

Environmental ecology, the scientific study of the distribution and abundance of life and the interactions between organisms and their natural environment, highlights another challenge that results in part from global climate change: the planetary loss of biodiversity. According to a May 2019 UN report, "nature is declining globally at rates unprecedented in human history—and the rate of species extinctions is accelerating, with grave impacts on people around the world now likely" (Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services [IPBES], 2019). The report, which drew on 15,000 scientific and government sources, concluded that up to 1 million animal and plant species are threatened with extinction, out of a total of 8 million currently existing species—a threat it says is unprecedented in human history. Among land-based, freshwater, and sea-based species that have been studied in detail, an estimated one out of every four is believed to be threatened. A third of all coral reefs are imperiled, threatening the loss of a key habitat for many ocean species, as well as jeopardizing the welfare of people who depend on coral reefs for seafood, commercial fishing, and tourism. Even insects, which are vital for pollination of crops and plants, are in peril; as much as a tenth of all insect species are threatened (IPBES, 2019).

> Recently, the human exceptionalism paradigm has been challenged by the new ecological paradigm, which emphasizes the complex interactions involved in global ecosystems. Some believe we have even entered a new geological era, the Anthropocene, in which humans are the main drivers of change in our ecosystems.

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There are many causes of biodiversity loss. Growing global population and urbanization have altered three-quarters of our planet's land environments and two-thirds of its marine environments, with more than a third of all land and three-quarters of all freshwater resources now being used for crops or livestock. Deforestation, the result of timber harvesting, agricultural expansion, and fires, has increased significantly. Pollution from toxic industrial waste, runoff from fertilizers, and plastics has contributed to extensive ocean "dead zones"; plastic pollution alone has increased tenfold over the past 40 years. Global warming has made its own direct contribution to biodiversity loss, playing a role in massive forest fires, droughts, and flooding. As ocean temperatures have risen, and as the oceans absorb increasing amounts of atmospheric carbon dioxide, the oceans lose oxygen and become increasing acidic, destroying coral reefs and threatening the sea life that depends on them. Global warming has also meant the extinction of existing species ill-suited to the rising temperatures, and their replacement by other "invasive" species that are better suited, further reducing biodiversity (IPBES, 2019; IPCC, 2019b; National Oceanic and Atmospheric Administration, 2019).

Industrialized countries have become "throwaway societies," polluting the environment by routinely discarding a staggering volume of items: When we buy food in grocery stores, it is often wrapped in packages that are immediately discarded; products bought online arrive in cardboard or plastic, which winds up in garbage dumps (and often the ocean); electronic waste—computers, cell phones, and the host of toys and gadgets that contain electronic circuits—are routinely "recycled" to landfills in poor countries, where there are few, if any, safeguards against contaminating local watersheds, farmlands, and communities.

The loss of biodiversity means more to humans than the loss of natural habitat, although many would agree with the nineteenth-century American writer Henry David Thoreau's spiritual musing, "In wilderness lies the preservation of the world." Biodiversity also provides humans with new medicines and sources and varieties of food, and it plays a role in

regulating atmospheric and oceanic chemistry. A recent UN report concludes that "ecosystems, species, wild populations, local varieties and breeds of domesticated plants and animals are shrinking, deteriorating or vanishing. The essential, interconnected web of life on Earth is getting smaller and increasingly frayed. This loss is a direct result of human activity and constitutes a direct threat to human well-being in all regions of the world" (IPBES, 2019).

## Food Security

Global warming, climate change, and the resulting losses of biodiversity already have had significant impacts on food security—access to sufficient, safe, and nutritious food that meets the need for an active and healthy life. A recent report by the Intergovernmental Panel on Climate Change noted that global food production is already challenged by increased population and rising incomes, the latter causing an increased demand for animal-sourced products that require additional land for livestock feed. Climate change is projected to worsen these stressors, with food insecurity found almost entirely in the developing world.

Persistent warming and long drought cycles, coupled with deforestation and land degradation, will have strong negative impacts on food production and the nutritional quality of the food that is produced and will lead to increased damage from invasive pests and resulting crop diseases. Extreme climate change–related weather events, such as flooding, extreme heat, and associated droughts, will worsen food security still further. The result is "immediate and long-term impacts on livelihoods of poor and vulnerable communities, contributing to greater risks of food insecurity that can be a stress multiplier for internal and external migration" (IPCC, 2019a).

According to a report by the UN Special Rapporteur on the right to food, an estimated 828 million people were already undernourished in 2022, especially in parts of sub-Saharan Africa, southeastern and western Asia, and Latin America (UN Food and Agriculture Organization [FAO], 2022)—a figure that, if current global warming trends continue, could rise to nearly a billion people by mid-century. The number at risk of hunger is predicted to increase by as much as 20 percent over the same period, with two-thirds located in sub-Saharan Africa. Most of the world's poor live in rural areas; some 2.5 billion people depend on agriculture for their survival, relying on it for food as well as household income. Another UN

report concluded that “climate change is undermining the right to food, with disproportionate impacts on those who have contributed least to global warming and are most vulnerable to its harmful effects” (Elver, 2015a).

## Environmental Injustice

Although the rich are the world’s main consumers, the environmental damage that is caused by growing consumption has the greatest effect on the poor. The wealthy are in a better position to enjoy the many benefits of consumption without having to deal with its negative effects. The poor are the most vulnerable, since they lack access to the resources that might enable them to adjust to climate change. Sociologist Robert Bullard (1996) pioneered the concept of environmental justice, based on the principle that all people and communities are entitled to equal protection of a country’s environmental and public health laws and regulations. Bullard studied the ways in which toxic environments in the United States, such as the location of highly polluting industrial plants, fell most heavily on the poor and racial minorities. Chemical plants, power stations, major roads, railways, and airports are often sited close to low-income areas. As Bullard succinctly summarizes his four decades of research, “Individuals who physically live on the ‘wrong side of the tracks’ are subjected to elevated environmental health threats and more than their fair share of preventable diseases” (Bullard, 2020).

Kids play on a merry-go-round near an oil refinery at the Carver Terrace housing project playground in West Port Arthur, Texas. West Port Arthur sits squarely on a two-state corridor routinely ranked as one of the country's most polluted regions.

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With increased attention to the global environmental implications of climate change, Bullard's arguments have been extended globally (Agyeman et al., 2003; Bullard, 2005; Bullard et al., 2016; Elver, 2015b). The notion of environmental injustice—that the harms suffered by ecosystems today are closely linked to and mirror the harms experienced by the most marginalized human beings across the planet—connects the effects of climate change to the world's most vulnerable people (Pellow, 2017). On a global level, as we have already seen, soil degradation, deforestation, water shortages, and toxic emissions of all sorts are most heavily concentrated in the Global South. Apart from severe droughts,

which are turning once-fertile lands into deserts, global warming threatens the water supplies of hundreds of millions of people, increases the danger of flooding for others, adversely affects agriculture in parts of the world, and further reduces the planetary biodiversity on which many depend.

This alerts us to another aspect of global environmental injustice: the fact that the most toxic industries are located in the poorest nations with the fewest enforced protections for vulnerable workers and communities. If, as Bullard comments, living on the "wrong side of the tracks" in the United States means one is more likely to get the toxic dump, living on the "wrong side of the world" means getting the factory that dumps pollutants into the neighborhood water supply or pumps them into the air that is breathed by local residents. Bangladesh and Pakistan, two countries where factories make clothing and textiles for U.S. and European firms, are among the countries with the worst atmospheric pollution (World Population Review, 2023b).

In Mexico City, a newspaper salesman uses a mask to protect himself from air pollution. Behind him a screen indicates the day's pollution levels.

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Sadly, even efforts to be ecologically responsible in the United States can contribute to environmental injustice in poor countries. In the Indonesian

village of Tropodo, a village of 5,000 people that makes much of the tofu that is part of the regional diet, the air is foul with acrid black smoke that results from burning paper and plastic waste, a major fuel in the tofu industrial process. The paper and plastic, in turn, originates from U.S. and other industrial countries' recycling efforts. Much of this material had previously gone to China for recycling, but in recent years, citing health and environmental concerns, China placed severe restrictions on receiving waste paper, discarded plastic, and unwanted metals. Such "foreign garbage" (as China described it) wound up in other, poorer countries in the region, including Indonesia. While most of the recycled plastic was supposed to be repurposed in fleece jackets and athletic shoes, in fact much of it turned out to be unusable or intermixed with paper. Tofu manufacturers prefer burning the paper-plastic mix to burning wood, since it is far cheaper; yet this exacts a significant environmental health toll on the workers and the entire community. Plastic fumes contain a number of toxic substances, including dioxin, a highly toxic chemical that causes cancer, birth defects, and Parkinson's disease. Dioxin also gets into the soil, where it is ingested by local hens and winds up in the eggs that are consumed throughout the village (International Pollutants Elimination Network, 2019; Ives, 2019; Paddock, 2019).

# Addressing Climate Change—What Is Being Done?

Given the scientific consensus that global warming and climate change require urgent attention if we are to avoid a "climate emergency" in the future, some steps have been taken to address its primary cause: greenhouse gas emissions. Governments, businesses, and ordinary citizens have all gotten in on the action. Are the actions that are currently being taken sufficient?

## The Politics of Climate Change: National Action to Stop Global Warming

The Paris Agreement, as we have seen, has thus far failed to get countries to comply with the necessary greenhouse gas reductions that would limit postindustrial global warming to 1.5 degrees Celsius, or even 2.0 degrees. It was further weakened in 2017, when President Trump announced that

the United States would no longer honor it. Following nearly two years of negotiations, formal withdrawal was announced in November 2019, to become effective late 2020. The United States' official reasons for withdrawal, as stated by Secretary of State Mike Pompeo, were that compliance with the Paris Agreement would hamper economic growth, and that the United States' current approach "incorporates the reality of the global energy mix and uses all energy sources and technologies cleanly and efficiently, including fossil fuels, nuclear energy, and renewable energy" (quoted in Friedman, 2019). U.S. withdrawal also reflected the official climate skepticism of the Trump administration, including that of President Trump himself, who on numerous occasions had either described climate change as a "hoax" or argued that climates always change, while denying the scientific consensus that current changes are human caused. However, in January 2021, President Joe Biden signed an executive order to reenter the United States into the Paris Agreement, of which it is now a member.

Secretary of State John Kerry speaks at a climate conference in Glasgow, Scotland, reaffirming the United States' participation in the Paris Agreement.

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Although the United States has been readmitted to the agreement, it remains uncertain whether China and other world signatories will act to significantly reduce their dependency on fossil fuels. As we've noted,

China currently accounts for 32 percent of the world's human-made carbon emissions, although it is now investing heavily in green technology. According to a report by the International Renewable Energy Agency (2019), in 2017 China accounted for nearly half of all global expenditures on renewable energy investment, leading to the conclusion that "no country has put itself in a better position to become the world's renewable energy superpower than China." China's president, Xi Jinping, has called on China to play a leadership role in clean-energy investment and addressing the issue of climate change (Associated Press, 2018).

Yet even if all other countries meet their Paris Agreement commitments to reduce greenhouse gases, will these actions be sufficient to halt global warming? The UN Environment Programme's (UNEP) 2019 *Emissions Gap Report* was not hopeful, noting that despite the Paris Agreement, greenhouse gas emissions continued to rise, with the world's 20 wealthiest economies accounting for four-fifths of the total. The largest emitters, according to the report, remained the United States and China. Unless drastic actions were taken, the report predicted, global temperatures were on pace to rise by as much as 3.9 degrees Celsius (7 degrees Fahrenheit) by 2100. In order to achieve the optimal Paris goal of a 1.5-degree-Celsius increase, global emissions would have to decline by 7.6 percent a year over the next decade. "The size of these annual cuts may seem shocking," the report concluded, "particularly for 1.5°C. They may also seem impossible, at least for next year. But we have to try" (UNEP, 2019).

## Sustainable Development

Stopping—or even slowing—the environmental effects of climate change will therefore require significant actions on the part of individuals as well as nations. If the impoverished nations of the world are to catch up with the richer ones, a new path to development is needed. Such a path must couple scarce resource conservation with the reduction of greenhouse gases and other pollutants. This path has been called sustainable development, a term that was first used in a report by the World Commission on Environment and Development (1987), popularly known as the Brundtland Report, after former Norwegian prime minister Gro Harlem Brundtland, who chaired the commission. The report defined sustainable development simply as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs." This definition sought to reconcile two seemingly intractably opposed communities: environmentalists, who were often seen

as anti-growth, and businesspeople, who were often seen as anti-environment. Environmentalists could now argue that, at least in wealthy industrial nations, environmentally harmful economic development should be limited, while conceding that economic growth might be necessary to lift people out of poverty in the Global South.

The notion of sustainable development, while popular, remains unclear: What are the needs of the present? How much development can occur without compromising the future, particularly since we don't know what the future effects of technological change may be (Giddens, 2009)? However imprecise the term, *sustainable development* is generally taken to mean that growth should, at least minimally, be carried on in such a way as to preserve and recycle physical resources rather than deplete them, to maintain biodiversity, and to keep pollution to a minimum by protecting clean air, water, and land. Stated most simply, sustainable development means that today's business and political leaders should leave our planet's future in good health for their children and grandchildren.

One way sustainable development can be achieved is by switching from a carbon-based economy to one based on renewable energy that emits fewer greenhouse gases. This involves moving from coal, petroleum, and gas to clean technologies (so-called greentech), such as solar and wind power, and using biofuels, more fuel-efficient transportation, advanced storage batteries, and hi-tech power grids. As the cost of greentech has come down, global greentech investments have gone up, with $332 billion invested in clean energy in 2018. China, as noted previously, is the largest investor in greentech, followed by Europe and the United States (BloombergNEF, 2019). While $332 billion may seem like a large investment, by way of comparison, total global investment in conventional, nonrenewable energy was four times as great ($1.5 trillion) in 2018 (International Energy Agency, 2019). In that year the world's governments provided roughly the same amount in tax breaks and other forms of subsidies in support of oil extraction as was being invested in clean energy (Meyer, 2018).

There was initially some hopeful evidence that economies could grow sustainably without producing increased greenhouse gases. Even though global GDP grew by 3 percent during the two-year period of 2014–2015, carbon emissions remained flat (International Energy Agency, 2016). But according to the World Meteorological Organization (2019), between 2015 and 2019 carbon dioxide emissions actually increased, resulting in an

accelerated increase in the atmospheric concentration of major greenhouse gases. One detailed study of leading fossil fuel–producing countries found that rather than curbing fossil fuel production as sought by the Paris Agreement, “governments are planning to produce about 50 percent more fossil fuels by 2030 than would be consistent with a 2°C pathway and 120 percent more than would be consistent with a 1.5°C pathway” (Stockholm Environment Institute et al., 2019). So far, the efforts of the world’s leading economies to meet Paris goals and stop (or even slow) global warming have not been encouraging.

A case can be made that nuclear energy is a clean alternative to petroleum, since nuclear plants do not emit greenhouse gases. Although widely used in Europe—more than a quarter of Europe’s energy comes from nuclear power plants—nuclear energy also has a number of potential drawbacks. One problem is the possibility of a nuclear plant accident that releases deadly radiation, such as the one that occurred in Chernobyl, Ukraine, in 1986, exposing more than 6 million people and requiring the resettlement of some 300,000. There are also problems with disposing of radioactive waste from spent nuclear fuel, which remains highly toxic for thousands of years. There is the danger that nuclear fuel could be stolen and used to make nuclear weapons. Even unrelated natural disasters can create serious safety concerns: It is estimated that a fifth of the world’s 460 reactors are in areas vulnerable to earthquakes, while a quarter are located on coastlines where flooding—increasingly likely with sea level rise—is a danger (Vidal, 2018; World Nuclear Association, 2018). In 2011, a 9.0 magnitude earthquake and resulting tsunami caused three nuclear reactors to experience meltdown at the Fukushima Daiichi nuclear power plant in Japan, requiring the evacuation of some 63,000 people; seven years later, less than half had returned home (Harding, 2018). As a result of the Japan disaster, several European countries planned to phase out nuclear power. Germany, for example, took the dramatic step of pledging to shutter its nuclear reactors by 2022; this deadline was extended to April 2023 after Russia’s war on Ukraine caused a natural gas shortage in much of Europe (BASE, 2023).

## Environmental Social Movements

Individual actions, such as recycling or buying sustainable products, are important steps that signal a personal commitment to make a difference. But such actions, by themselves, are unlikely to have a significant effect on global warming. To be truly effective, individual actions must be mobilized

into large-scale social movements, which we defined (in Chapter 13) as "groups of people who seek to accomplish, or to block, a process of social change."

There is evidence that a social movement may be emerging around climate change. During the September 2019 Global Week for the Future (also called the Climate Strike), an estimated 4 million people took to the streets in 150 countries around the world to demand that their governments take action to halt global warming. Massive peaceful demonstrations, drawing hundreds of thousands of participants, many of whom were school age, occurred in major metropolitan areas such as New York City, London, Berlin, Melbourne, Manila, Nairobi, and Rio de Janeiro, as well as towns on every continent (even scientists in Antarctica joined in). The demonstrations were timed to coincide with the United Nations Climate Action Summit, which brought world leaders together to address climate change (Sengupta, 2019).

The global demonstrations were the direct result of actions a year earlier by a 15-year-old Swedish schoolgirl. In August 2018, Greta Thunberg stopped going to school, deciding it was more important to protest Swedish government inaction on the climate crisis. So instead of attending classes, Thunberg protested outside the Swedish Parliament, holding a sign that read "*Skolstrejk för klimatet*" ("school strike for the climate"). Her ideas quickly caught on, creating an international movement of school students who were willing to miss classes to protest government inaction on climate change, even if it meant being disciplined for absenteeism. Thunberg became a global symbol of the urgency felt by a growing number of high school and college students, who had concluded that they would be paying the price for their parents' generation's inaction on climate change. When she addressed the UN Summit, Thunberg pulled no punches:

**Table 19.1APPLYING SOCIOLOGY TO POPULATION, URBANIZATION, AND THE ENVIRONMENT**

| CONCEPT | APPROACH TO UNDERSTANDING POPULATION, URBANIZATION, AND THE ENVIRONMENT | CONTEMPORARY APPLICATION |
|---|---|---|
| **Second demographic transition** | In a few industrial economies, birthrates have become lower than death rates, as families choose to have fewer children. This results in an aging population, along with population decline. | Greece, Japan, Italy, and Portugal have all lost population from natural increase—a fate that may await other countries as they become wealthier. |
| **The new ecological paradigm** | An increasingly influential way of thinking, emerging in the 1970s, that emphasizes the complex human and natural interactions involved in global ecosystems and recognizes that the biophysical environment is not limitless. | Environmental sociology—a branch of sociology that examines the relationships between social systems and the ecosphere, studying such areas as the origins and impacts of technology, the relationship between social change and environmental change, and the role of social inequality and power relationships in shaping human interactions with the environment. |

| | | |
|---|---|---|
| **Anthropocene** | A term meaning “human epoch” used to denote the current geological period, in which many geologically significant conditions and processes are profoundly altered by human activities. | Understanding the role of carbon emissions and the greenhouse effect; global warming and climate change; and the need for concerted international action to avoid increasingly catastrophic climate emergencies. |
| **Food security** | People’s access to sufficient, safe, and nutritious food that meets the need for an active and healthy life. | Global warming, climate change, and drought threaten food security for a significant portion of the world population; even today, more than 800 million people are undernourished. |

| | | |
|---|---|---|
| **Environmental injustice** | Damaged ecosystems are closely linked to the harms experienced by the most marginalized human beings across the planet. Pollution, climate change, and other ecological challenges do the most damage to the world's poorest people. | Deforestation in the Amazon further impoverishes the Indigenous peoples who live there and depend on the forests; the most toxic industries are found in the poorest communities and nations. |
| **Sustainable development** | Economic development that meets the needs of the present without compromising the ability of future generations to meet their own needs. | Switching from carbon-based economy to renewable energy; balancing economic development with ecological considerations; studying social movements in support of sustainable development. |

This is all wrong. I shouldn't be up here. I should be back in school on the other side of the ocean. Yet you all come to us young people for hope. How dare you! You have stolen my dreams and my childhood with your empty words. And yet I'm one of the lucky ones. People are suffering. People are dying. Entire ecosystems are collapsing. We are in the beginning of a mass extinction, and all you

> can talk about is money and fairy tales of eternal economic growth. How dare you! (Thunberg, 2019)

By early 2020 Thunberg had amassed some 3 million followers on Twitter and Facebook, and more than 8 million followers on Instagram. Her efforts clearly show that all it takes is one young girl to inspire massive demonstrations, if the issue is seen as urgent and the timing is right. Thunberg's success is also the result of social media's ability to go viral, communicating direct actions (such as Thunberg's solitary protest outside the Swedish Parliament) to a large and receptive youthful audience.

Students gather on Jungfernstieg, a main boulevard in Hamburg, Germany, as part of a global demonstration to demand action against climate change.

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But do large-scale protests, even those involving millions of people, constitute an effective social movement that will lead to change? There is evidence that a large majority of people around the planet are now deeply concerned about climate change. A 2022 Pew Research Center survey of nearly 25,000 people in 19 countries found that 75 percent viewed climate change as a "major threat," up from 56 percent 10 years earlier. For the United States, the figure was considerably lower (54 percent), although still significantly higher than 10 years earlier (40 percent). The survey did find that there were strong ideological differences in the United States: 78 percent of respondents who reported being or leaning Democratic reported seeing climate change as a major threat, compared with only 23 percent of respondents who reported being or leaning Republican (Poushter et al.,

2022; Tyson et al., 2023). Perhaps most significantly, there appear to be significant differences based on age in the United States—this is not surprising, perhaps, given the youth-driven protests inspired by Thunberg and other activists. A 2021 Gallup survey found that 78 percent of young adults (ages 18–29) were worried either “a great deal” or “fair amount” about global warming, compared with only 60 percent of Americans aged 65 and older (Saad, 2021c).

There are numerous social movement organizations concerned with climate change, global warming, and climate justice. One of the largest, 350.org, links hundreds of organizations around the globe, has been involved in more than a dozen campaigns, and supports grassroots efforts by organizations in communities that are directly affected by climate change. (The name 350 is taken from 350 parts per million of carbon dioxide, identified more than a decade ago as one climate “tipping point” for atmospheric carbon dioxide concentration.) Founder Bill McKibben (2019) argues, “If we don’t solve it soon, we will never solve it, because we will pass a series of irrevocable tipping points—and we’re clearly now approaching those deadlines.” While he is hopeful that there are growing and increasingly effective global environmental social movements, Doug McAdam, one of sociology’s leading social movement theorists, has pointed out that there have historically been a number of barriers that have thwarted their success in the United States: the influence of well-funded and politically powerful climate change deniers in shaping public opinion; congressional gridlock; the fact that the worst impacts are in the future and are therefore intangible, relative to more pressing problems; and the absence of what he termed “ownership” by any significant segment of the public, unlike African Americans mobilizing around police shootings, or women around sexual assault (Martinovich, 2017; McAdam, 2017). With the increased involvement of youth around the world, McAdam does offer some guarded optimism: “In the ’60s, it was civil rights and then the Vietnam War. Climate change absolutely has that kind of emotional resonance for people, particularly for young people, because they’re going to have to deal with it.” But McAdam also points out that in the 1960s, youth activism was reinforced by broader progressive trends in U.S. politics, leading him to wonder how much staying power today’s young activists will have, if their efforts do not lead to immediate results (quoted in Weise, 2019). Social movement scholars debate whether such movements are more effective when they focus on grassroots action, such as mass mobilizations and nonviolent protests, or when they become more

institutionalized, focusing on lobbying, legislation, and working within established governance frameworks (Ogrodnik & Staggenborg, 2016).

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**CONCEPT CHECKS**

1. **What is urbanization? How is it related to globalization?**
2. **How do population growth, urbanization, and industrialization affect the global environment?**
3. **What are the principal causes of global climate change, and what is being done to address them?**
4. **Define sustainable development and provide at least one criticism of the concept.**
5. **How does the new ecological paradigm differ from the human exceptionalism paradigm?**

---

# Glossary

conurbation
: An agglomeration of towns or cities into an unbroken urban environment.

megalopolis
: The “city of all cities” in ancient Greece; used in modern times to refer to very large conurbations.

megacities
: A term favored by Manuel Castells to describe large, intensely concentrated urban spaces that serve as connection points for the global economy.

aging in place
: A phenomenon in which many rural areas have disproportionately high numbers of older adults because young persons seek opportunities elsewhere and leave the older persons behind.

suburbanization
: The development of suburbia—areas of housing outside inner cities.

gentrification
: A process in which older, deteriorated housing and other buildings are renovated as more affluent groups move into an area.

urban renewal

The process of renovating deteriorating neighborhoods by using public funds to renew old buildings and construct new ones, often through large-scale demolition of slum housing.

Anthropocene
: A term used to denote the current geological epoch, in which many geologically significant conditions and processes are profoundly altered by human activities.

environmental ecology
: The scientific study of the distribution and abundance of life and the interactions between organisms and their natural environment.

food security
: Access to sufficient, safe, and nutritious food that meets the need for an active and healthy life.

environmental injustice
: The principle that the harms suffered by ecosystems today are closely linked to and mirror the harms experienced by the most marginalized human beings across the planet.

sustainable development
: Development that meets the needs of the present without compromising the ability of future generations to meet their own needs.

# 4 UNANSWERED QUESTIONS

**Consider that global population growth will outstrip our resources, and what might be the best sociologically informed approach to environmental change.**

Population growth, industrialization, urbanization, and the resulting environmental disruptions provide many challenges for sociological research. In this final section, we consider two questions whose answers remain contested—one asking whether global population growth will outstrip global food production, resulting in widespread famine; the other asking whether avoiding climate change through sustainable development is even possible, or if far more drastic measures need to be taken.

## Will Global Population Growth Outstrip Resources?

During the rise of industrialism, many looked forward to a new age in which food scarcity would be a phenomenon of the past. The development of modern industry, it was widely supposed, would create a new era of abundance. In his celebrated work *Essay on the Principle of Population* (1798/2003), Thomas Malthus criticized these ideas and initiated a debate about the connection between population and food resources that continues to this day.

At the time Malthus wrote, the population of Europe was growing rapidly. Malthus pointed out that whereas population growth is exponential, food supply depends on fixed resources that can be expanded only by developing new land for cultivation. Population growth therefore tends to outstrip the means of support available. The inevitable outcome is famine, which, combined with the influence of war and plagues, acts as a natural limit to population increase. Malthus predicted that human beings would always live in circumstances of misery and starvation, unless they practiced what he called “moral restraint.” His cure for excessive population growth was for people to delay marriage

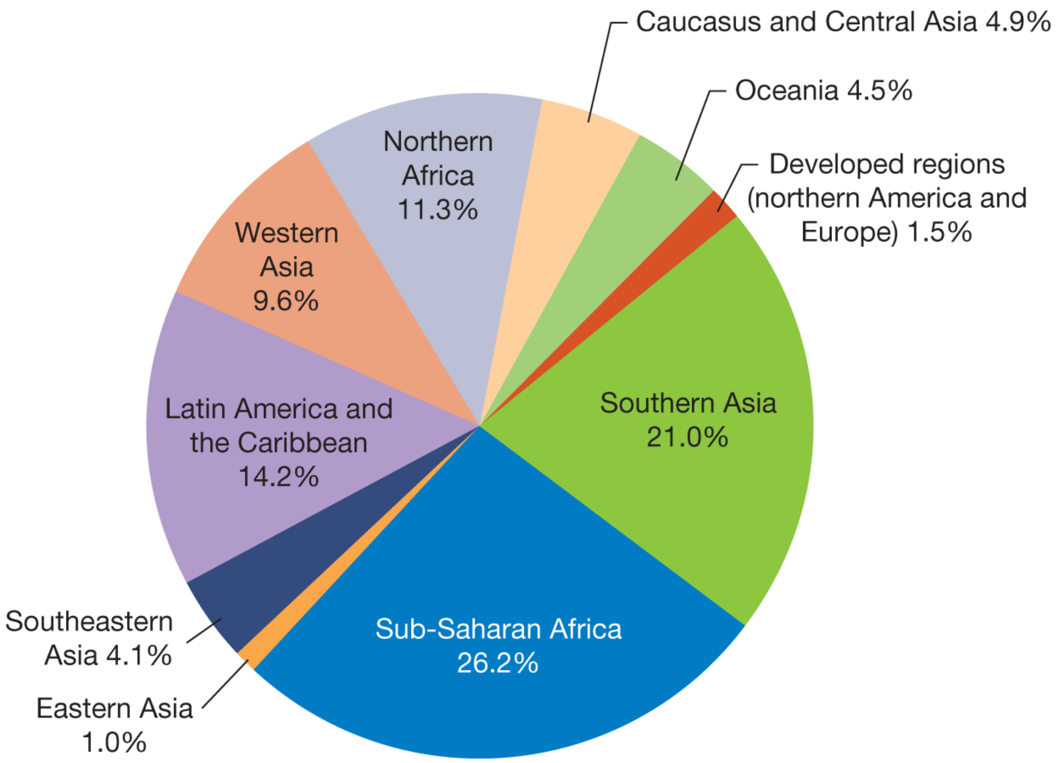
and to strictly limit their frequency of sexual intercourse. (The use of contraception, he proclaimed, was a “vice.”)

For a while, Malthusianism was ignored. The population development of the Western countries followed a quite different pattern from what he had anticipated. Rates of population growth trailed off in the nineteenth and twentieth centuries. Indeed, in the 1930s there were major worries about population decline in many industrialized countries, including the United States. Malthus also failed to consider that technology that fostered increases in food production would be developed in the modern era. However, the upsurge in world population growth in the twentieth century has again lent some credence to Malthus’s views. Population expansion in the Global South seemed to be outstripping the resources that those countries could generate to feed their citizenry—especially in nations that suffered from such natural disasters as droughts and floods that hurt local food supplies.

Malthusian arguments got a boost when the biologist Paul Ehrlich published his best-selling book *The Population Bomb* in 1968. Ehrlich (1968) predicted a catastrophic global collapse, as an exploding world population vastly outstripped global food production. Famine would overtake India and other populous countries, and hundreds of millions of people would perish in the coming decades. His arguments received support from another study published a few years later. The authors of *The Limits to Growth* (Meadows et al., 1972) used advanced (for the time) computer-simulation modeling to project the complex interaction of five factors they believed to be key to understanding the earth–human system interrelationship: population, industrialization, pollution, food production, and resource depletion. Their predictions were dire: a high likelihood of global agricultural and economic collapse by the mid to late twenty-first century. Ehrlich updated (and reaffirmed) his arguments some 20 years later in *The Population Explosion* (Ehrlich & Ehrlich, 1990), and he gave even more dire predictions in a keynote address to the annual meeting of the American Sociological Association in 2012.

Figure 19.3

**THE DISTRIBUTION OF HUNGER IN THE WORLD, 2021**




Source: UN FAO et al., 2022.

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Famine and food shortages are indeed a serious concern. About 795 million people in the world suffer from hunger or undernourishment (UN FAO, 2015). In some parts of the world, more than a third of the population is undernourished (see Figure 19.3). As the population rises, levels of food output will need to rise accordingly to avoid widespread scarcity. Yet many of the world's poorest areas are particularly affected by water shortages, shrinking farmland, and soil degradation—processes that reduce, rather than enhance, agricultural productivity. It is almost certain in such areas that food production will not occur at a level to ensure self-sufficiency. Large amounts of food and grain will need to be imported from areas where there are surpluses.

On the other hand, as noted at the beginning of this chapter, the most widely accepted prediction of global population sees a leveling off at 10–12.5 billion people by the end of the century, the result of a "second demographic transition," which, contrary to Malthusian predictions, would result in lower (rather than higher) fertility. Having a large number of children may make sense in preindustrial countries, where child mortality is high and children provide an important source of labor on family farms, but in modern industrial societies large families can be an

economic cost rather than an asset: Children tend to be economic consumers rather than producers. As more and more countries in the Global South are brought into the global economy, the reasoning goes, they will undergo their own demographic transition to a low mortality/low fertility equilibrium, thereby radically slowing population growth. Population may in fact initially surge: As countries in the Global South adopt modern farming technology and public health measures developed in industrial nations, mortality will decline. But eventually, fertility will follow suit, and a low-growth equilibrium will result. Among industrial economies, such as Germany, Italy, Japan, and Russia, fertility has dropped below replacement levels, resulting in a declining population, at least among the native-born population. (Growth in such cases can occur only through immigration.)

Moreover, doomsday predictions have long underestimated global increases in food production, which, thanks in part to advances in farming technology, have so far managed to keep pace with population growth. According to a study by the UN Food and Agriculture Organization, even the projected population growth to 2050 can be accommodated by increased food supply—if certain conditions are met: drawing on additional (but available) land and water resources, achieving higher crop yields, and preserving biodiversity. The study concludes:

> According to FAO's baseline projections, it should be possible to meet the future food and feed demand of the projected world population in 2050 within realistic rates for land and water use expansion and yield development. However, achieving this will not at all be automatic and several significant challenges will have to be met. . . . The conditions under which this can be achieved are strong economic growth, global expansion of food supplies by about 70 percent, relatively high production growth in many developing countries achievable through growing capital stock, higher productivity and global trade helping the low income food deficit countries to close their import gaps for cereals and other food products at affordable prices. (UN FAO, 2011)

The key problem, according to this view, is not that population growth is outstripping food production, as Malthus predicted more than 200 years ago; it is that the results of increased agricultural productivity are not equitably distributed. The counterargument to Malthusian pessimism, simply stated, lies neither with the biological food-producing capacity of

the planet nor with the failure of agricultural technology to keep pace. It lies with the fact that a small proportion of the world's population consumes a vastly unequal proportion of the world's natural resources. The solutions, in other words, are to be found in societal terms, not a biological imperative. Karl Marx (1867/1977, 1859/1993), in his criticism of Malthus, argued that starvation results not from overpopulation, but rather from an economic system that enables the capitalist class to enjoy the fruits of production (including food) at the expense of everyone else. The solution, in Marx's view, was neither war, pestilence, nor famine, but rather communism, an economic system that he thought would provide adequate food for workers and farmers, and also enable them to self-regulate their population growth rate.

What will be the consequences of these changes? Some observers see the makings of widespread social upheaval—particularly in countries in the Global South undergoing demographic transition. The rapid growth of cities will be likely to lead to environmental damage, new public health risks, overloaded infrastructures, rising crime, and impoverished squatter settlements. Changes in the economy and labor markets may prompt widespread internal migration as people in rural areas search for work. Warfare and civic violence also cause people to migrate. Civil war in Syria, the rise of radical Islamist movements in the Middle East and North Africa, and the war in Ukraine have laid waste to entire cities. Millions of refugees have fled war-torn countries as a result. By the end of 2022, 12.4 million refugees and another 1.3 million asylum seekers had fled to Europe. Many of these included Ukrainians fleeing violence from Russia (UN High Commissioner for Refugees [UNHCR], 2022). Of the refugees and asylum seekers arriving in Europe, 159,400 arrived via the hazardous crossing of the Mediterranean that took the lives of more than 1,800 migrants in 2022 (Cuddy, 2023). Refugees, like all migrants, seek out major cities, where the possibility of finding work is the greatest. This enormous movement of people has placed significant strains on the resources of the destination countries (UNHCR, 2022).

Technological advances in agriculture and industry are unpredictable, so no one can be sure how large a population the world might eventually be able to support. Even if technological solutions are found, will they be used to benefit those in the poorest regions of the world, who face the direst Malthusian prospects—or to increase the consumption of those in

relatively wealthy countries, who are most likely to be insulated from catastrophic collapse?

# Sustainable Development, or Adaptation to the Inevitable?

As we have seen, sustainable development requires governments to take immediate actions to reduce their countries' carbon emissions, in part by switching to more renewable forms of energy, commitments that are reflected in the Paris Agreement. Apart from state-led efforts, many environmental advocates argue that if global ecological disaster is to be avoided, people in rich countries should consume more sustainably: they need to recycle, carpool, use public transportation, and buy fewer items. Consumers are urged to buy eco-friendly products, which is now possible since virtually all major corporations claim to be fully committed to ecological sustainability. To take but two examples, Walmart, whose revenues make it the world's largest corporation, promises over the next 5 to 10 years to have reduced its greenhouse gas emissions by a billion metric tons while deriving half of its energy from renewable sources (Walmart, 2019). The Sustainable Apparel Coalition (SAC) comprises more than a hundred major apparel, footwear, and textile companies that promise "no unnecessary environmental harm" in manufacturing their products. To achieve this goal, the member firms self-report environmental and workplace conditions throughout their supply chains, which are then compiled into a sustainability index (Kibbey, 2016; SAC, 2019).

Critics counter that while government and individual sustainable development efforts are laudable and should be pursued, by themselves they are unlikely to solve our climate problems. They point out that whatever governments may have agreed to in Paris, in fact fossil fuel production remains heavily subsidized and has actually increased in recent years. In terms of individual actions, critics claim that eco-friendly shopping is certainly a worthy goal that may make a small difference, but it is unlikely to significantly affect climate change unless billions of people join in. Furthermore, they argue, it relies on businesses to truthfully report their ecological impacts—claims that must be treated skeptically, since such claims are almost never independently verified. Business efforts to trumpet their sustainability are seen as all too often a

form of “greenwashing,” an effort to boost sales by convincing consumers that the products they buy are eco-friendly (Appelbaum, 2016; Appelbaum & Lichtenstein, 2016).

Because some amount of global warming seems inevitable, a recent IPCC report emphasized measures that might be taken to offset some of the predicted consequences. These included recommendations for early warning systems, flood and cyclone shelters, sea walls and levees, desalinization plants to convert seawater to drinking water, and programs to educate people about the dangers of global warming. But will such actions prove sufficient? In the view of some scientists, even with such limited measures, rising temperatures and associated destructive climate events are inevitable, unless truly drastic steps are taken. Another, more drastic solution is geoengineering, large-scale interventions in the earth’s natural systems to counteract climate change. Some geoengineering proposals are global in scope but do not seek to dramatically alter existing ecosystems—for example, massive reforestation to remove carbon dioxide from the atmosphere. Other proposals involve novel interventions with unknown long-term ecological effects: building giant “space mirrors” or releasing reflective particles in the upper atmosphere to deflect the warming rays of the sun; converting seawater into droplets that can be used to seed clouds and increase cloud cover; building huge machines to remove and bury atmospheric carbon dioxide; seeding the ocean with nutrients that will grow plants that absorb carbon dioxide (Oxford Geoengineering Programme, 2019; Pierce, 2019). Critics worry that such large-scale efforts to reengineer the earth’s ocean, land, and atmosphere may divert attention from the need to reduce greenhouse gas emissions, while potentially resulting in disastrous ecological consequences (National Academy of Sciences, 2015; Vaughan, 2019).

One final approach involves simply accepting the inevitability of climate change and learning to live with it. According to this view, climate-induced social collapse is inevitable, requiring a *deep adaptation agenda* in response. Such an agenda has three components: recognizing that individuals and societies have proven remarkably resilient in bouncing back from trauma and disaster, so things will eventually work themselves out; letting go of past expectations about the possibility of endless but sustainable growth; and adapting to the “new normal” by rediscovering a simpler way of life—the beliefs and lifestyles that preceded our current carbon-driven economies. The new lifestyle involves such measures as

restoring the original wildland environments; eating locally produced seasonal foods, rather than importing food grown half a world away; and replacing our electronically mediated forms of virtual interaction with a return to actual face-to-face communication in local communities. Deep adaptation will clearly be psychologically and spiritually challenging for many, since it means adapting to a very different world than the one most of us were born into (Slater & Bendel, 2019; Verlie, 2019).

Where do you stand personally on this debate? How might a sociological understanding help you make an informed decision?

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**CONCEPT CHECKS**

1. **Explain Malthus's position on the relationship between population growth and the food supply.**
2. **Is sustainable development possible—or is it now necessary to find ways to adapt to global warming and extreme climate change?**

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# Glossary

Malthusianism
: A doctrine about population dynamics developed by Thomas Malthus, according to which population increase comes up against "natural limits," represented by famine and war.

geoengineering
: Large-scale interventions in the earth's natural systems to counteract climate change.

# THE BIG PICTURE

# Chapter 19

## Population, Urbanization, and the Environment

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**Exercises:** Thinking Sociologically

1. Explain what makes the urbanization now occurring in developing countries, such as Brazil and India, different from and more problematic than the urbanization that took place a century ago in New York, London, Tokyo, and Berlin.
2. Following analysis presented in this chapter, concisely explain how the expanded quest for cheap energy and raw materials and present-day dangers of environmental pollution and resource depletion threaten not only the survival of people in developed countries but also that of people in less developed countries.

# BASIC CONCEPTS p. 781

## Learning Objectives

Learn the key concepts demographers use to understand world population growth and the changes in cities.

## Terms to Know

demography • crude birthrates • age-specific birth rates • fertility • crude death rates • mortality • infant mortality rate • life expectancy • life span • rates of population growth or decline • exponential growth • doubling time • demographic transition • second demographic transition • dependency ratio

## Concept Checks

1. Why is demography considered a branch of sociology?
2. How does the age structure of a society affect fertility, mortality, and thereby population growth?
3. What are the stages of a demographic transition, and why do some demographers believe that we've now entered a fourth stage?

# URBAN SOCIOLOGY: SOME INFLUENTIAL THEORIES p. 788

## Learning Objectives

Understand how theories of urbanism have placed an increasing emphasis on the influence of socioeconomic factors on city life.

## Terms to Know

urbanization • ecological approach • inner city • ghetto • urbanism • created environment • collective consumption • global city

## Concept Checks

1. How does urban ecology use language from the physical sciences to explain life in modern cities? How did Drake and Cayton's study challenge the ideas of urban ecology?
2. What is the urban interaction problem?

3. According to Jane Jacobs, the more people there are on the streets, the safer the streets will be. Do you agree with Jacobs's hypothesis and her explanation for this proposed pattern?
4. What are the four main characteristics of global cities?

# Population Growth, Urbanization, and Environmental Challenges: Recent Research p. 796

## Learning Objectives

See how the environment is a sociological issue related to industrialization, urbanization, and population growth.

## Terms to Know

conurbation • megalopolis • megacities • aging in place • suburbanization • gentrification • urban renewal • Anthropocene • environmental ecology • food security • environmental injustice • sustainable development

## Concept Checks

1. What is urbanization? How is it related to globalization?
2. How do population growth, urbanization, and industrialization affect the global environment?
3. What are the principal causes of global climate change, and what is being done to address them?
4. Define sustainable development and provide at least one criticism of the concept.
5. How does the new ecological paradigm differ from the human exceptionalism paradigm?

# UNANSWERED QUESTIONS p. 826

## Learning Objectives

Consider that global population growth will outstrip our resources, and what might be the best sociologically informed approach to environmental change.

### Terms to Know

Malthusianism • geoengineering

### Concept Checks

1. Explain Malthus's position on the relationship between population growth and the food supply.
2. Is sustainable development possible—or is it now necessary to find ways to adapt to global warming and extreme climate change?

# Glossary

demography
: The study of populations.

crude birthrates
: Statistical measures representing the number of births within a given population per year, normally calculated in terms of the number of births per 1,000 members.

fertility
: The average number of live-born children produced by women of childbearing age in a particular society.

crude death rates
: Statistical measures representing the number of deaths that occur annually in a given population, normally calculated as the ratio of deaths per 1,000 members. Crude death rates give a general indication of the mortality levels of a community or society, but they are limited in their usefulness because they do not take into account the age distribution.

mortality
: The number of deaths in a population.

infant mortality rate
: The number of infants who die during the first year of life, per 1,000 live births.

life expectancy
: The number of years the average person can expect to live.

life span
: The maximum length of life that is biologically possible for a member of a given species.

rates of population growth or decline
: A measurement of population change calculated by subtracting the yearly number of deaths per 1,000 from the number of births per 1,000.

exponential growth
: A geometric, rather than linear, rate of progression; producing a fast rise in the numbers of a population experiencing such growth.

doubling time
: The time it takes for a particular level of population to double.

demographic transition
: A theory that shows how birth and death rates are related to stages of industrial development, with high birth and death rates transitioning to low birth and death rates as a country transitions from a preindustrial to an industrialized economy.

second demographic transition
: A new demographic model that predicts that fertility rates will continue to fall because of shifts in family structure.

dependency ratio
: The ratio of people of dependent ages (children and older adults) to people of economically active ages.

urbanization
: The movement of the population into towns and cities and away from rural areas.

ecological approach
: In the field of urban analysis, a perspective emphasizing the “natural” distribution of city neighborhoods into areas having contrasting characteristics.

inner city
: The areas composing the central neighborhoods of a city, as distinct from the suburbs. In many modern urban settings in the developed world, inner-city areas are subject to dilapidation and decay, with the more affluent residents having moved to outlying areas.

ghetto
: A place where a racial or ethnic group initially comes to live as a consequence of systematic exclusion from more desirable places.

urbanism
A term used by Louis Wirth to denote distinctive characteristics of urban social life, such as its impersonality.

created environment
An environment made up of constructions established by human beings to serve their needs, derived from the use of human-made technology—including, for example, roads, railways, factories, offices, private homes, and other buildings.

collective consumption
A concept used by Manuel Castells to refer to processes of urban consumption—such as the buying and selling of property.

global city
A city, such as London, New York, or Tokyo, that has become an organizing center of the new global economy.

conurbation
An agglomeration of towns or cities into an unbroken urban environment.

megalopolis
The "city of all cities" in ancient Greece; used in modern times to refer to very large conurbations.

megacities
A term favored by Manuel Castells to describe large, intensely concentrated urban spaces that serve as connection points for the global economy.

aging in place
A phenomenon in which many rural areas have disproportionately high numbers of older adults because young persons seek opportunities elsewhere and leave the older persons behind.

suburbanization
The development of suburbia—areas of housing outside inner cities.

gentrification
A process in which older, deteriorated housing and other buildings are renovated as more affluent groups move into an area.

urban renewal
The process of renovating deteriorating neighborhoods by using public funds to renew old buildings and construct new ones, often through large-scale demolition of slum housing.

Anthropocene
A term used to denote the current geological epoch, in which many geologically significant conditions and processes are profoundly

altered by human activities.

environmental ecology
: The scientific study of the distribution and abundance of life and the interactions between organisms and their natural environment.

food security
: Access to sufficient, safe, and nutritious food that meets the need for an active and healthy life.

environmental injustice
: The principle that the harms suffered by ecosystems today are closely linked to and mirror the harms experienced by the most marginalized human beings across the planet.

sustainable development
: Development that meets the needs of the present without compromising the ability of future generations to meet their own needs.

Malthusianism
: A doctrine about population dynamics developed by Thomas Malthus, according to which population increase comes up against "natural limits," represented by famine and war.

geoengineering
: Large-scale interventions in the earth's natural systems to counteract climate change.

age-specific birthrates
: Statistical measures representing the number of births within a given population per year in relation to age distribution.

# 20 Globalization in a Changing World

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Who is the most popular pop music artist in the world today?

1. **The Weeknd**
2. **Jungkook (BTS)**
3. **Bad Bunny**
4. **Taylor Swift**
5. **Shakira**

**TURN THE PAGE FOR THE CORRECT ANSWER.**

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## LEARNING OBJECTIVES

1. **Basic Concepts** Recognize that numerous factors influence social change, including the physical environment, political organization, culture, and economic factors.
2. **Current Theories: Is Globalization Today Something New—or Have We Seen It All Before?** Understand the debates among skeptics, hyperglobalizers, and transformationalists over whether globalization differs radically from anything in human history.
3. **Recent Research on Globalization and Social Change** Recognize that globalization is not solely an economic phenomenon but rather the combined effect of technological, political, and economic changes. Understand how globalization has contributed to the rise of individualism, reshaped work patterns, influenced pop culture, and created new forms of risk and inequality.
4. **Unanswered Questions** Evaluate the notion that social change is ushering us into a postindustrial or postmodern stage of social organization. Understand why new forms of global governance are needed to address the risks, challenges, and inequalities produced by globalization.

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It is understandable if you guessed Taylor Swift—after all, she has been at the top of the pop charts for more than a decade, has reportedly sold over 100 million records, and is one of the most highly streamed pop artists. But in 2022–2023 the top artist was Benito Antonio Martínez Ocasio, popularly known as Bad Bunny: With 18.5 billion streams, he has been Spotify's most globally streamed artist for the past three years. The politically outspoken Puerto Rican musician's 2022 album *Un Verano Sin Ti* (*A Summer Without You*), which drew on different Caribbean musical styles, played especially well in the United States; his touring alone that year grossed $374 million dollars. *Un Verano Sin Ti*—the lyrics are in Spanish, not English—topped the *Billboard* 200 list for 13 weeks in 2022, the most for any album (Herrera, 2022).

The other artists on the opening quiz are, of course, also top rated. Abel Tesfaye—better known as The Weeknd—by some measures can also be seen as the most globally popular musician. The release of "Die for You," which he recorded with Ariana Grande (whose pre-release teaser went viral on TikTok), led him to top billing on Spotify in March 2023, with more than 111 million monthly listeners. That put the Ethiopian Canadian

singer well ahead of Colombian songstress Shakira (81.6 million), American pop star Taylor Swift (80.2 million), and Korean K-pop superstar Jungkook (12.6 million) (Atwal, 2023; Spotify, 2023).

Pop artists around the world draw on one another for themes, styles, and inspiration. This is an example of hybridity—a notion adopted from biology to capture the fact that cultures are neither isolated nor wholly distinct but in fact borrow from one another. This has been true historically and arguably has accelerated in recent years. Music has always crossed borders: gospel, blues, jazz, reggae, hip-hop, and rock and roll can all be traced to African roots (Lewis, 2016). But today globalization brings people, and their cultures, into more immediate intimate contact with one another then ever before, whether through travel or migration, economic interdependence, mass media, or popular culture. Social media plays a central role in connecting popular music across a global space. Streaming services such as Spotify, Apple Music, Amazon Music, and YouTube make it possible for musicians from different cultures to share musical styles, and for listeners to access music from anywhere around the globe. A fairly recent arrival, after Latino rock and Korean K-pop, is Chinese C-pop, which originates in mainland China, Hong Kong, Macau, and Taiwan. C-pop developed in the 1920s, when Western music companies in Shanghai made the first pop music recordings. One of its original inspirations was Hong Kong singers performing Mandarin cover versions of Japanese popular ballads, which were themselves a mixture of Japanese and American styles that featured, for instance, saxophone backgrounds. Today C-pop is a hybrid of different genres, including Chinese pop, rock, and hip-hop (MasterClass, 2021; Nederveen Pieterse, 2001).

In this chapter, we go beyond our earlier discussions of globalization, examining the ways global processes affect our lives on many levels. We explore how globalization has contributed to the profound social changes that are sweeping the world today and consider what the future is likely to bring.

# Glossary

hybridity

A term adopted from biology to convey that cultures are neither wholly isolated nor entirely distinct, but instead constantly borrow from one another.

# 1 BASIC CONCEPTS

**Recognize that numerous factors influence social change, including the physical environment, political organization, culture, and economic factors.**

Imagine standing before a clock that measures time on a cosmic scale, in which each second represents 60,000 years. On such a clock, it would take 24 hours for the 5-billion-year history of our planet to unfold. Humanlike apes would not even appear until the last two minutes, and human beings only in the last four seconds. Compared to us, even the dinosaurs would look like long-term residents of the planet; they roamed the earth for nearly three-quarters of an hour on our 24-hour clock, before disappearing forever. Will human beings—whose great civilizations appeared only in the last quarter second—do nearly as well?

Human beings are very recent residents of planet Earth, yet we have unquestionably made our presence known. Our numbers have exploded to some 8 billion people and will probably approach 10 billion by 2050. We have spread to every nook and cranny on the planet. Thanks to modern science and industry, each of us uses up a vastly greater amount of the planet's limited resources than did our apelike ancestors. Indeed, the combination of population explosion and modern industrial expansion threatens both our planet and human civilization.

Humans have demonstrated a unique ability to create massive problems—and then find ways to solve them. Today our problems are global, requiring global solutions. Globalization has contributed to such challenges as global warming and climate change; the worldwide spread of HIV/AIDS; pandemics like Covid-19; conflict among nations; terrorism; and global poverty. Yet globalization can also contribute to their solution. All human beings share a common home and, therefore, a common interest in its preservation.

## Social Change

During a period of only two or three centuries—a sliver of time in the context of human history—human social life has been wrenched away from the types of social order in which people lived for thousands of years. Social change can be defined as the transformation over time of the institutions and culture of a society. Globalization has accelerated these processes of social change, affecting virtually all of humanity. As a result, far more than any generation before us, we face an uncertain future. To be sure, previous generations were at the mercy of natural disasters, plagues, famines, and warfare. And while these problems still trouble much of the world, today we must also deal with new social forces that we ourselves have unleashed.

Social theorists have tried for the past two centuries to develop a single grand theory that explains social change. Marx, for example, emphasized the importance of economic factors in shaping social life, including politics and culture. But no single-factor theory can account for the diversity of human social development from hunting and gathering and pastoral societies, to traditional civilizations, to the highly complex social systems of today. In analyzing social change, it is useful to identify four major types of globalization, provided that we bear in mind that all four are interrelated: Changes in one affect all the others. Environmental, political, economic, and cultural globalization together influence social change in ways that will transform the world throughout your life—and in unpredictable ways.

## Environmental Globalization

The physical environment often affects the development of human social organization. This is clearest in extreme environmental conditions, where people must organize their ways of life in relation to the weather. For example, people in polar regions develop different practices from those living in subtropical areas. Residents of Alaska, where the winters are long and cold and winter days very short, follow different patterns of social life than residents of the much warmer U.S. South. Most Alaskans spend more of their lives indoors and, except in summer months, plan outdoor activities carefully, given the inhospitable environment.

Less extreme physical conditions can also affect society. The Indigenous population of Australia has remained hunters and gatherers because the continent has hardly any native plants suitable for cultivation or animals

suitable for pastoral production. Most of the world's early civilizations originated in areas with rich agricultural land—for instance, in river deltas. The ease of communication across land and the availability of sea routes are also important: Societies cut off from others by mountain ranges, impassable jungles, deserts, or oceans often remained relatively unchanged over long periods.

Today, all that is rapidly changing. Globalization has greatly reduced the barriers, in time and space, that once separated societies. Environmental globalization refers to the ways in which human actions have environmental impacts with planetary effects. Well-known examples include greenhouse gas emissions that result in global warming, extreme weather events, climate change, and the loss of biodiversity. Environmental globalization also includes global efforts to address these challenges, through international regulations, treaties, and broad agreements intended to slow global warming. The United Nations Framework Convention on Climate Change, drafted at the UN-sponsored 1992 Earth Summit in Brazil, called on all countries to "stabilize greenhouse gas concentrations in the atmosphere to prevent dangerous interference from human activity on the climate system"; more than 175 countries signed it (UN, 1992). There have been 27 conferences since that time, reflecting efforts to put teeth into the agreement—for example, requiring countries to reduce their greenhouse gas emissions sufficiently to keep global warming from increasing more than 1.5 degrees Celsius (2.7 degrees Fahrenheit) above preindustrial levels, a tipping point after which environmental changes may become catastrophic (see Chapter 19 for a more detailed discussion).

Unfortunately, it is not clear that this goal will be achieved: The world's top emitters will need to make strong efforts to switch from gas and oil to renewable energy. The world's three largest emitters of greenhouse gasses—the United States, China, and India, which account for two-fifths of the global total—do not seem likely to achieve this soon. One recent study predicts that the 1.5-degree-Celsius threshold will be reached within a decade, and an increase to 2 degrees Celsius (3.6 degrees Fahrenheit) may be reached by mid-century (Diffenbaugh & Barnes, 2023).

This highlights one of the key challenges posed by environmental globalization: Greenhouse gas emissions and their climate-related effects are felt globally. Whether it be melting polar icecaps, rising sea levels,

excessive drought, or torrential rain, environmental effects cross borders with impunity. Environmental change, especially in an increasingly interconnected world, is truly global—but governance remains local (or, in a few cases, regional, as with the European Union). As the example of the UN Framework Convention on Climate Change shows, implementing global agreements, which requires passing and enforcing laws and regulations at the national level, can be challenging.

## Political Globalization

As the previous discussion suggests, political globalization has not kept pace with environmental globalization. Political globalization refers to the growing influence of international governmental institutions that enact—and seek to enforce—laws and regulations that are binding on the countries that ratify them. The challenge is that governance remains largely local: Modern nation-states are almost always unwilling to give up their sovereignty (the undisputed political rule of a state over a given territorial area; see Chapter 13).

There is one clear exception: the European Union (EU, 2023). Formally established in 1993 with 9 member countries, the EU today encompasses 27 member states with nearly 450 million people. The EU operates as a federation in which member states retain most of their sovereignty but relinquish some powers, mostly in the areas of commerce and environmental protection, to elected overarching governing bodies. Most member countries allow passport-free movement across their borders to other member countries, as if the EU—much like the United States—were a single country made up of different states. Twenty member states have even given up their own currencies, once key symbols of their national sovereignty as well as a major tool for managing their economies (through control of the money supply).

Why were so many countries willing to concede substantial political authority to a regional governing body? One reason was to preserve peace and strengthen international security through international cooperation; the twentieth century had seen two world wars fought between European countries, claiming as many as 100 million lives. Another key reason, however, was economic: The creation of a single, unified economic market composed of nearly a half billion people, with the free flow of people and goods across borders, was seen as making

Europe into an economic power. While the EU currently has many challenges—the persistence of Covid-19, the influx of some 22 million people displaced by conflict and famine, the Russian invasion of Ukraine, the rise of authoritarian populism—it has remained viable since its founding 30 years ago.

The only country to officially leave the EU was Britain in 2020, the result of the so-called Brexit vote in Britain, a June 2016 referendum in which slightly more than half of all voters (52 percent) called for Britain to withdraw from the EU. The vote passed because of voters' populist concerns about immigration and the belief that Britain was surrendering too much national sovereignty to the EU governance system in Brussels. While opponents of Brexit argued that such concerns were greatly overblown, they could not assuage the fears of a majority of voters. The Brexit vote sent shock waves throughout the EU, since it raised fears that other countries might eventually follow suit. While it is difficult to estimate any economic costs of Britain's exit, one recent study found that it somewhat reduced the nation's GDP, trade, and investment, while contributing to a rise in the cost of living; nearly three out of five British people surveyed now say the decision to leave was wrong (Euronews, 2022; Springford, 2023).

While the EU provides a rare example of countries willing to concede some national sovereignty at the regional level, global examples are far fewer in number. In 1920, after the end of the First World War, the League of Nations was created in hopes of preventing another deadly European war. Its charter provided for disarmament, shared security agreements, and the settling of disputes between countries through negotiation and binding arbitration. While the League eventually grew to 58 members, it lacked real enforcement capability (such as its own military), and it proved powerless to prevent the Second World War, which led to its demise. Although its leading planner had been U.S. president Woodrow Wilson, the United States never joined.

After the Second World War the League was replaced by the United Nations, which today has 193 members. The UN, as we have seen, plays an active role in international agreements that combat human-caused climate change. Among its many other activities, the UN also enacts treaties that seek to limit the spread, development, testing, and use of nuclear weapons; promulgates laws of the sea that regulate and protect marine environments; promotes conventions that protect workers' rights

through the International Labour Organization; promotes world health (as during the Covid-19 pandemic) through the World Health Organization; and engages in peacekeeping efforts in war-torn areas around the world (although, like the League, the UN lacks its own military, and must depend on voluntary forces provided by member countries at their own expense).

Rwandan refugees try to reach the UN camp in Tanzania. According to the United Nations, approximately 800,000 Tutsis and moderate Hutus were killed during a period of 100 days in 1994. Hundreds of thousands of Rwandans fled to neighboring countries to escape the bloodshed.

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While the UN clearly plays an important global role, it lacks the power of a truly global government. While its General Assembly comprises all member states, each with one vote, its true power resides in its Security Council, composed of 15 members—10 rotating members elected for two-year terms by the General Assembly and 5 permanent members, which are the 5 countries that played key roles in creating the UN. Significant UN actions require the consent of its Security Council, which in turn requires the agreement of at least 9 of its 15 members, including all 5 of its permanent members (the United States, France, England, the Russian Federation, and China). Each of these 5 members has veto power, effectively creating a two-tiered governance system. Although all

countries that have ratified the UN Charter agree to be legally bound to UN resolutions, none of these 5 countries can be compelled to relinquish sovereignty on the basis of resolutions adopted by the General Assembly or approved by the other members of the Security Council (Falk, 2022).

As the examples of the EU, League of Nations, and UN show, global governance is limited by the willingness of countries—especially the most powerful ones—to voluntarily give up even a limited amount of national sovereignty to international governing bodies. According to some theorists, globalization is challenging national governments' ability to effectively exert leadership, since in their view political power is becoming increasingly uncoupled from geography (Sassen, 1996; Shaw, 2000). Sociologist William Robinson (2001, 2004, 2014), for example, claims that as economic power has become deterritorialized, so, too, has political power: Just as transnational corporations operate across borders, with few or no national allegiances, transnational political organizations are becoming stronger as national governments are becoming weaker.

Will the twenty-first century see new forms of political organization better suited to a world in which people, products, knowledge, religious beliefs, pop culture, and pollution all cross borders easily? Although it is too soon to tell, most likely, the most important forms of political organization of this century will bear little resemblance to those of the twentieth.

## Economic Globalization

There is one area, however, where countries have given up some degree of political sovereignty: They have relinquished some control over the economic forces that have reshaped the world over the last half century. Economic globalization—the cross-border flow of investment; production of goods and services; money and finance; and science and technology—has resulted in an increasingly global economy that challenges national governmental control. As we saw in Chapter 14, the revenues of the world's largest transnational corporations, whether retailers such as Walmart or Amazon or energy companies such as China's Sinopec or Royal Dutch Shell, are larger than the GDP of most countries.

Governments seek to control cross-border economic flows in various ways. We have seen one approach, the creation of a regional government such as the European Union, which requires member countries to give up some degree of economic sovereignty; it has yet to be replicated elsewhere. The most common approach is for countries to negotiate regional trade agreements, ratified by each government, that confer mutual benefit on all partners. The United States–Mexico–Canada Agreement (formerly called NAFTA, the North American Free Trade Agreement) includes provisions intended to stimulate trade between the three countries by lifting most tariffs on goods produced in each country, while protecting U.S. workers, farmers, and agriculture businesses by prohibiting the import of goods made under forced labor. The United States is partner to 14 such agreements with 20 countries around the world. As of December 2022, there were 355 regional trade agreements throughout the world.

The globalization of science, technology, and production supply chains requires the use of common standards: A typical car today has some 18,000 suppliers—many from around the globe—providing everything from the steel and aluminum used in frames and engines to microchips and electronic control systems (Baumgartner et al., 2020; Murphy et al., 2022). All of these components must work together seamlessly, which requires all countries to agree to common standards, from rules for laboratory testing to specifications for manufacturers' products. The International Organization for Standards works with national standards bodies in 169 countries; it currently provides nearly 25,000 international technology and manufacturing standards (International Organization for Standardization, 2023). The World Trade Organization (WTO), created in 1995, grew out of institutions created at the end of the Second World War that were designed to promote the free movement of goods and services across borders, in the belief that this would foster global economic cooperation and thereby avert future world wars. The WTO has the power to punish countries that violate its principles of free trade.

The emergence of an increasingly global economy has resulted in great wealth, but has also contributed to inequality, climate change, and environmental destruction (see Chapters 8, 9, and 19). It is no longer clear that it will continue in its present form. China's meteoric rise as a technological, political, and economic power has challenged the belief that so-called free markets are the best path to economic success. Rather

than let private businesses shape the global economy, the Chinese government has tightly managed the Chinese economy, including the implementation of 5- and 15-year government plans to determine which technological and economic sectors should receive large-scale public investment. China's economic size and high-tech capabilities now rival those of the United States, which has led to a trade war in which both the United States and China are seeking to restrict their trade in goods and services. Instead of the global supply chains that characterized the rise in globalization, there is now an increased emphasis on bringing production "back home," making each country less dependent on the other. How this will play out in the long run remains to be seen. The current U.S. trade war with China calls into question whether economic globalization will continue or will begin to give way to the growing economic and political rivalry between countries that characterized the first half of the twentieth century (see Chapters 9 and 14 for further discussion of China's rise and impact on the global economy).

## Cultural Globalization

Cultural globalization—the spread of cultural values, beliefs, and norms across borders—is hardly something new, but as with the other three forms of globalization, modern communications technology has intensified cultural globalization over the last half century. This process has been accelerated by the advent of social media. Moreover, cultural globalization is not a one-way flow. For example, U.S. superstar Taylor Swift spreads her U.S. brand of pop music around the world, and K-pop groups such as BTS do the same for Korean popular music. Both forms draw on classical rock and roll, which itself grew out of music carried by enslaved Africans to the United States, the Caribbean, and South America. As we saw in the chapter introduction, pop music is an example of hybridity, in which cultures borrow from one another.

An Egyptian girl walks next to the Muslim Fulla dolls at a kids' shop in Cairo. Two years after she first came on the market, Fulla is now thought to be the best-selling girls' toy in the Arab world, displacing her Western rival, Barbie.

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We have seen throughout this book how the internet and the proliferation of smartphones have transformed our personal relationships, our forms of recreation, the ways in which we learn and work, and the nature of politics and social movements—in fact, almost every aspect of modern life. These changes, among the most rapid in human history, have caused what geographer David Harvey (1990) calls "time-space compression." And they have all occurred within a single generation.

Cultural globalization often occurs through the creation of institutions intended to spread ideas. Economic globalization, paradoxically, is an example: As the Second World War was coming to an end, the soon-to-be victorious countries got together in Bretton Woods, New Hampshire, and laid out a global blueprint for free trade that resulted in today's highly globalized economy as well as the institutions that were created to enforce it. Two economists—John Maynard Keynes, an advisor to the British Treasury, and Harry Dexter White, an advisor to the U.S. Treasury Department—played key roles in what would become the global economic architecture during the postwar period. These ideas were spread throughout the world through such institutions as the World Bank and the International Monetary Fund (IMF), in which the United States

played key roles. The so-called Washington Consensus, the belief that governments should play little or no role in economic affairs, spread globally in the late 1980s, but not on its own: It was supported by U.S. government policy, think tanks, the previously mentioned global institutions, and economic consulting firms (Appelbaum et al., 2001; Irwin & Ward, 2021). These ideas are now being challenged globally by China, which is spreading its belief in what it calls “socialism with Chinese characteristics,” or “state capitalism.” The opposite of free trade, this approach envisions an economic system in which the state plays a central role by setting goals for key economic sectors, heavily funding investment in those sectors, and managing key industries. Given China’s meteoric economic development over the past few generations, many poor countries are coming to view this approach as more promising than the Washington Consensus model.

Religion is another example of cultural globalization; the global spread of religious beliefs dates back to biblical times. As we saw in Chapter 13, the principal cultural clashes of the twenty-first century may be between those who believe that truthful understanding derives from religious faith and those who find such understanding in science, critical thinking, and secular thought (Juergensmeyer, 2003). Secular ideals, such as self-betterment, freedom, equality, and democratic participation, are largely creations of the past two or three centuries. In the United States, political debates rage between religiously conservative Republicans who promote teaching creationism (versus evolution) in schools and oppose abortion, and liberal Democrats whose politics are guided by scientific evidence and preservation of civil rights. Not surprisingly, creationism is much more likely to be taught in public school systems in politically conservative districts in the South than in more liberal regions of the North (Kirk, 2014).

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## CONCEPT CHECKS

1. **What are the most important political factors that influence social change?**
2. **Name two examples of cultural factors that may influence social change.**
3. **How does industrial capitalism affect social change?**

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# Glossary

social change
: Alteration in basic structures of a social group or society. Social change is an ever-present phenomenon in social life but has become especially intense in the modern era. The origins of modern sociology can be traced to attempts to understand the dramatic changes shattering the traditional world and promoting new forms of social order.

environmental globalization
: The ways in which human actions have environmental impacts with planetary effects.

political globalization
: The growing influence of international governmental institutions that enact—and seek to enforce—laws and regulations that are binding on the countries that ratify them.

economic globalization
: The cross-border flow of investment, as well as the production of goods and services, money and finance, and science and technology.

cultural globalization
: The spread of cultural values, beliefs, and norms across borders.

# 2 CURRENT THEORIES: IS GLOBALIZATION TODAY SOMETHING NEW —OR HAVE WE SEEN IT ALL BEFORE?

**Understand the debates among skeptics, hyperglobalizers, and transformationalists over whether globalization differs radically from anything in human history.**

In recent years, globalization has become a hotly debated topic. Most people accept that important transformations are occurring, but the extent to which one can attribute them to "globalization" is contested. This disagreement is not surprising, given the unpredictable and turbulent process that globalization involves. David Held and his colleagues (1999) have identified three schools of thought: skeptics, hyperglobalizers, and transformationalists. These approaches to the globalization debate are summarized in Table 20.1.

## The Skeptics

Skeptics in the globalization controversy believe that present levels of economic interdependence are not unprecedented. Pointing to nineteenth-century statistics on world trade and investment, they contend that modern globalization differs from the past only in the intensity of interaction among nations. While they agree that countries today may have more contact than in previous eras, in their eyes, the current world economy is not sufficiently integrated to constitute a truly globalized economy. This is because the bulk of trade occurs within three regional groups: Europe, Asia-Pacific, and North America. The countries of the EU, for example, trade predominantly among themselves. The same is true of the other regional groups, thereby invalidating the notion of a single global economy (Hirst, 1997).

Many skeptics focus on *regionalization* within the world economy—such as the emergence of major financial and trading blocs—as evidence that the world economy has become less integrated rather than more (Boyer & Drache, 1996; Hirst & Thompson, 1999). Compared with the patterns of trade that prevailed a century ago, they argue, the world economy is less global in its geographical scope and more concentrated on intense pockets of activity. They strongly reject the view held by some, such as the hyperglobalizers, that globalization is producing a world order in which national governments are less central. According to the skeptics, national governments continue to be key players because of their involvement in regulating and coordinating economic activity. Governments, for example, are the driving force behind many trade agreements and policies of economic liberalization.

## The Hyperglobalizers

The hyperglobalizers argue that globalization is a very real phenomenon, the consequences of which can be felt almost everywhere. They see globalization as a process that is indifferent to national borders. In their view, globalization is producing a new global order, swept along by powerful flows of cross-border trade and production. They argue that individual countries no longer control their economies because of the vast growth in world trade. National governments and the politicians within them have decreasing control over the issues that cross their borders, such as volatile financial markets and environmental threats. Citizens recognize that politicians' ability to address these problems is limited and, as a result, lose faith in existing systems of governance. Some hyperglobalizers believe that the power of national governments is also being challenged from above—by new regional and international institutions, such as the EU and the World Trade Organization (WTO). These shifts signal the dawning of a global age (Albrow, 1997) in which national governments decline in importance and influence.

Sociologists such as William Robinson (2001, 2004), Leslie Sklair (2002a, 2002b, 2003), and Saskia Sassen (1996, 2005) tend to reject the label of *hyperglobalist*, a term they associate with such popular writers or journalists as Thomas Friedman, whose best-selling books *The Lexus and the Olive Tree* (2000)

and *The World Is Flat* (2005) paint a picture of globalization as a juggernaut that sweeps up everything in its path. Nonetheless, they do argue that transnational economic actors and political institutions are challenging the dominance of national ones. Robinson has studied these changes throughout the world, with a special focus on Latin America. He argues that the most powerful economic actors today are not bound by national boundaries; they are transnational. For example, the "transnational capitalist class" is emerging out of (and is transforming) the capitalist classes of individual countries, because the transnational corporations they manage are global rather than national. By the same token, he argues that nation-states are becoming "component elements" of a transnational state—exemplified, for example, by the WTO, which serves the interests of global businesses as a whole by ensuring that individual countries adhere to the principles of free trade. Robinson (2001) concludes that "the nation-state is a historically specific form of world social organization in the process of becoming transcended by globalization."

# The Transformationalists

The transformationalists take more of a middle position. Writers such as David Held and Anthony G. McGrew (Held et al., 1999) and Anthony Giddens (1990), one of the authors of this textbook, see globalization as the central force behind a broad spectrum of change. According to them, the global order is being transformed, but many of the old patterns remain. Governments, for instance, still retain a good deal of power in spite of global interdependence. These transformations are not restricted to economics but are equally prominent within politics, culture, and personal life. Transformationalists contend that the current level of globalization is breaking down established boundaries between internal and external, international and domestic. In adjusting to this new order, societies, institutions, and individuals must navigate contexts where previous structures have been shaken up.

Unlike hyperglobalizers, transformationalists see globalization as a dynamic and open process that is subject to influence and change. It is developing in a contradictory fashion, encompassing tendencies that frequently operate in opposition to one another. Globalization is a two-way flow of images, information, and influences. Global migration, media, and telecommunications are contributing to the diffusion of cultural influences. According to transformationalists, globalization is a decentered process characterized by links and cultural flows that work in a multidirectional way. Because globalization is the product of numerous intertwined global networks, it is not driven from one particular part of the world.

**Table 20.1CONCEPTUALIZING GLOBALIZATION: THREE TENDENCIES**

| CHARACTERISTIC | SKEPTICS | HYPERGLOBALIZERS | TRANSFORMATIONALISTS |
|---|---|---|---|
| **What's new?** | Trading blocs, weaker geogovernance than in earlier periods | Historically unprecedented levels of global interconnectedness | A global age |
| **Dominant features** | World less interdependent than in 1890s | "Thick" (intensive and extensive) globalization | Global capitalism, global governance, global civil society |
| **Power of national government** | Reinforced or enhanced | Reconstituted, restructured | Declining or eroding |

| CHARACTERISTIC | SKEPTICS | HYPERGLOBALIZERS | TRANSFORMATIONALISTS |
|---|---|---|---|
| **Driving forces of globalization** | Governments and markets | Combined forces of modernity | Capitalism and technology |
| **Pattern of stratification** | Increased marginalization of Global South | New architecture of world order | Erosion of old hierarchies |
| **Dominant motif** | National interest | Transformation of political community | McDonald’s, Apple, etc. |
| **Conceptualization of globalization** | As internationalization and regionalization | As the reordering of interregional relations and action at a distance | As a reordering of the framework of human action |
| **Historical trajectory** | Regional blocs / clash of civilizations | Indeterminate: global integration and fragmentation | Global civilization |
| **Summary argument** | Internationalization depends on government acquiescence and support. | Globalization is transforming government power and world politics. | Globalization means the end of the nation-state. |

Source: Adapted from Held et al., 1999.

Rather than losing sovereignty, as the hyperglobalizers argue, countries are restructuring in response to new, nonterritorial forms of economic and social organization (e.g., corporations, social movements, and international bodies). Transformationalists argue that we are no longer living in a state-centric world; instead, governments must adopt a more active, outward-looking stance under the complex conditions of globalization (Cerny, 2005; Rosenau, 1997). In other words, nation-states remain relevant actors, but their function is changing. Globalization can perhaps be best understood as a tension between *inter*national (among nation-states) and *trans*national (borderless) social forces.

# Whose View Is Most Nearly Correct?

There are elements of truth in all three views, although the transformationalists’ view is perhaps the most balanced. The skeptics underestimate how much the world is changing; world finance markets, for example, are organized on a global level much more than ever before. Yet, at the same time, the world has undergone periods of globalization before—only to withdraw into periods when countries protected their markets and closed their borders to trade. Although the march of globalization seems inevitable, it may not continue unabated: Countries that find themselves losing out may attempt to stem the tide, as indicated by Brexit as well as recent elections in Germany, Poland, and the United States.

On the one hand, the hyperglobalizers are correct in pointing to the current role of globalization in dissolving many national barriers, changing the nature of state power, and creating powerful transnational

social classes. On the other hand, they often see globalization too much in economic terms and too much as a one-way process. In reality, globalization is much more complex. World-systems theorists such as Immanuel Wallerstein (2004) and Giovanni Arrighi (1994) have argued that while countries remain important actors on the global field, transnational corporations also play vital roles. National governments will neither dissolve under the weight of a globalized economy (as some hyperglobalizers argue) nor reassert themselves as the dominant political force (as some skeptics argue), but rather will seek to steer global capitalism to their own advantage. The world economy of the future may be much more globalized than today's, with multinational corporations and global institutions playing increasingly important roles. But some countries in the world economy may still be more powerful than even the most powerful transnational actors.

The world is in the midst of a highly dynamic and turbulent transformation. It is not surprising, perhaps, that scholars cannot agree on the social forces that are reshaping it (Hsu, 2021). At the present time, as we have noted elsewhere, the rise of populism and nationalism suggests that many governments seek to stem the forces of globalization by exerting more control over their economies (Rodrik, 2019)—a trend that was strengthened by the global economic downturns of 2007–2009 and 2020. The latter downturn resulted from Covid-19 and revealed the vulnerability of a world economy dependent on global supply chains (Coeurderoy & Yang, 2020; Gray, 2020; Hsu, 2021). And as we have mentioned, the rise of China as an economic power provides a more state-centered model that challenges the free trade ideas that contributed to the increase in economic globalization during the past half century. The best conclusion we can make aligns most closely with the views of the transformationalists: While globalization is currently under challenge, it is not going away. We can only speculate on what form it might take during your lifetime.

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**CONCEPT CHECKS**

1. **Compare and contrast how the skeptics, the hyperglobalizers, and the transformationalists explain the phenomenon of globalization.**
2. **How might skeptics, hyperglobalizers, and transformationalists interpret differently the growing global prominence of China?**

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# 3 RECENT RESEARCH ON GLOBALIZATION AND SOCIAL CHANGE

**Recognize that globalization is not solely an economic phenomenon but rather the combined effect of technological, political, and economic changes. Understand how globalization has contributed to the rise of individualism, reshaped work patterns, influenced pop culture, and created new forms of risk and inequality.**

As we have emphasized throughout this textbook, *globalization* refers to the fact that we increasingly live in one world, so that individuals, groups, and nations become more *interdependent*—that is, what happens 12,000 miles away is likely to have enormous consequence for our daily lives. In this section, we examine how advances in technology, coupled with political and economic changes, including the rise of transnational corporations, have contributed to globalization. We then consider the impact of globalization on both our personal lives and the wider social world, examining how globalization has introduced new forms of risk and exacerbated global wealth inequality.

## Factors Contributing to Globalization

Although globalization is often portrayed solely as an economic phenomenon, it is in fact created by the coming together of technological, political, and economic factors. It has been driven above all by the development of information and communications technologies that have intensified the speed and scope of interaction among people worldwide.

### Information Flows

Important advances in technology and the world's telecommunications infrastructure have facilitated the explosion in global communications. The post–World War II era has seen a transformation in the scope and

intensity of telecommunications flows. Traditional telephone communication, which depended on analog signals sent through wires and cables, has been replaced by integrated systems in which vast amounts of information are compressed and transferred digitally. Cable technology has become more efficient and less expensive. The development of fiber-optic cables, for example, has dramatically expanded the number of channels that can be carried, and even this recent technology has achieved significant advances. The spread of communications satellites has also helped expand international communications. As of 2023, there were roughly 7,300 active satellites in orbit—half of them from Elon Musk's company SpaceX (Grossman, 2023).

The effect of these communications systems has been staggering. In countries with highly developed telecommunications infrastructures, homes and offices have multiple links to the outside world, including telephones (both landlines and cell phones), digital and cable television, and the internet. The internet is the fastest-growing communication tool ever developed. More than 5.3 billion people worldwide (two-thirds of the world's population) were estimated to be using the internet at the end of 2022. There is, of course, a great deal of regional variation in internet access, ranging from 92 percent of people in high-income countries to only 26 percent in low-income countries (International Telecommunication Union, 2022).

Workers man a call center in Gurgaon, India.

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These forms of technology facilitate the compression of time and space: Not only can two individuals located on opposite sides of the planet hold a conversation in real time, but they can send documents and images or tweet their ideas to each other with the help of satellite technology. Widespread use of the internet and smartphones is accelerating processes of globalization; more people are becoming interconnected through these technologies in places that have previously been isolated or poorly served by traditional communications. Although the telecommunications infrastructure is not evenly developed around the world, a growing number of countries now have access to international communications networks.

Globalization is also being driven forward by the electronic integration of the world economy. The global economy increasingly involves activity that is weightless and intangible (Quah, 1999), because so many products have their base in information, as with computer software, media and entertainment products, and internet-based services. A variety of new terms describe this new social order, such as *information society*, *service society*, and *knowledge society*. The emergence of this "knowledge society" reflects a broad base of consumers who are technologically literate and who eagerly integrate new advances in computing, entertainment, and telecommunications into their everyday lives.

The very operation of the global economy reflects the changes characteristic of the information age. Many aspects of the economy now require networks that cross national boundaries (Castells, 1996). To be competitive in globalizing conditions, businesses and corporations have become more flexible and less hierarchical. Production practices and organizational patterns have become more adaptable, partnering arrangements with other firms have become commonplace, and participation in worldwide distribution networks has become essential.

The proliferation of smartphones is accelerating the process of globalization.

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Whether a semiskilled job is in a factory or a call center, it can be done more cheaply in a country in the Global South. The same is true for software engineering, graphic design, financial advice, and many other professional jobs requiring technical skill. Of course, to the extent that global competition for labor reduces the cost of goods and services, it also provides for a wealth of cheaper products (Roach, 2005). As consumers, we all benefit from low-cost flat-panel TVs made in China or inexpensive computer games programmed in India. It is an open question, however, whether the declining cost of consumption will balance out wage and job losses due to globalization.

## Political Changes

Political changes are driving forces behind contemporary globalization. One is the rise of regional organizations such as the European Union and

global governance bodies such as the United Nations, previously discussed. A second political factor—and one of the most significant—was the collapse of Soviet-style communism, which occurred in Eastern Europe in 1989 and in the Soviet Union itself in 1991. Since then, countries in the former Soviet bloc—including Russia, Ukraine, Poland, Hungary, the Czech Republic, the Baltic states, and the states of the Caucasus and Central Asia—have been moving toward Western-style political and economic systems and are increasingly integrated into the global community. In fact, the collapse of communism not only hastened processes of globalization but also was a result of them. The centrally planned communist economies and the ideological and cultural control of communist political authority ultimately could not survive in an era of global media and an electronically integrated world economy. These changes, of course, have not been without their own challenges—as we have seen in the war in Ukraine, as Russia seeks to retain control over a democratic country that was once part of the Soviet Union, in the face of opposition from the United States and its European allies.

A third political factor is the growing importance of international governmental organizations (IGOs) and international nongovernmental organizations (INGOs). An international governmental organization (IGO) is a body that is established by participating governments and given responsibility for regulating or overseeing a domain of activity that is transnational in scope. Such bodies regulate issues ranging from civil aviation to broadcasting to the disposal of hazardous waste. Prominent examples include the International Monetary Fund, the World Bank, the World Trade Organization, the Universal Postal Union, the North Atlantic Treaty Organization (NATO), the European Union, the Association of Southeast Asian Nations (ASEAN), and the UN.

Brexit, a June 2016 referendum in which a majority of voters called for Britain to exit the European Union, was fueled in part by concerns about immigration. Most EU member countries share open borders.

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International nongovernmental organizations (INGOs) differ from IGOs in that they are not affiliated with government institutions. Rather, they are independent organizations that work alongside governmental bodies in making policy decisions and addressing international issues. There are currently sone 41,000 active INGOs throughout the world; some of the best-known ones—such as Greenpeace, Médecins Sans Frontières (Doctors Without Borders), the International Committee of the Red Cross, Amnesty International, and Human Rights Watch—are involved in environmental protection and humanitarian relief efforts (Union of International Associations, 2022). But the activities of the lesser-known groups cover an enormous range of topics, from animal rights to sports; from popular hobbies to extremism and violence.

Finally, the spread of information technology has expanded the possibilities for contact among people worldwide, while also facilitating the flow of information about people and events in distant places. Some of the most gripping events of recent decades—such as the fall of the Berlin Wall; the violent crackdown on democratic protesters in China's Tiananmen Square; the terrorist attacks in New York City on September 11, 2001, as well as in Paris in 2015, Brussels in 2016, and Manchester

and London in 2017; and the Arab Spring protests—unfolded through the media before a truly global audience. Such events, along with less dramatic ones, have caused a reorientation in people's thinking from the level of the nation-state to the global stage. And, of course, social media such as Facebook, Twitter, and TikTok have also played active roles in contributing to the creation of social movements, from the Arab Spring to the 2020 effort by nationalist groups to violently occupy the U.S. Capitol in an effort to overturn the results of the 2020 presidential election (Alcorn, 2021; Tufekci, 2017, 2018; see also Chapter 13).

This shift to a global outlook has two significant consequences. First, as members of a global community, people increasingly perceive that social responsibility extends beyond national borders. There is a growing assumption that the international community has an obligation to act in crisis situations to protect the physical well-being or human rights of people whose lives are under threat. In the case of natural disasters, such interventions take the form of humanitarian relief and technical assistance. In two years alone (2022–2023), an earthquake in Turkey and Syria left more than 55,000 dead, 130,000 injured, and millions displaced; 62,000 Europeans died of heat-related deaths in the hottest summer on record; and more than 40,000 wildfires, covering some 3,500 square miles, ravaged forests and cities in Europe and North America, and even Hawaii, destroying Maui's historic town of Lahaina. Each of these humanitarian disasters has been a rallying point for global assistance. Today, with a growing awareness of the scientific consensus on the possible ramifications of global warming, environmental movements—united by social media—have mushroomed from the Marshall Islands to Miami.

There have also been stronger calls for interventions in the case of war, ethnic conflict, and the violation of human rights, although such mobilizations are more problematic than with natural disasters. In the case of the Gulf War in 1991 and the violent conflicts in Bosnia and Kosovo (in the former Yugoslavia), many people saw military intervention as justified in the interest of defending human rights and national sovereignty.

Second, a global outlook means that people increasingly look to sources other than the nation-state in formulating their own sense of identity. This phenomenon is produced by and further accelerates processes of globalization. Local cultural identities in various parts of the world are

experiencing powerful revivals at a time when the traditional hold of the nation-state is undergoing profound transformation. In Europe, for example, inhabitants of Scotland or the Basque region of Spain might be more likely to identify themselves as Scottish or Basque (or simply as European) rather than as British or Spanish. The nation-state as a source of identity is waning in many areas as political shifts at the regional and global levels loosen people's orientations toward the states in which they live. A form of nationalism based on ethnicity, religion, or culture—rather than nation-state—is reflected in growing persecution in many countries, and sometimes outright violence, against those perceived as non-native, such as immigrants or members of religious minorities.

## Economic Changes: The Growing Importance of Transnational Corporations

Among the many economic factors driving globalization, the role of transnational corporations is particularly important. Transnational (or multinational) corporations are companies that produce goods or market services in more than one country. These may be small firms with one or two factories outside the country where they are based or gigantic international ventures whose operations crisscross the globe. Some of the biggest transnational corporations in terms of revenues are retailers such as Walmart and Amazon; Apple; and energy companies (the three largest are Chinese: China's State Grid, China National Petroleum, and Sinopec). Other well-known top-ranked transnational corporations include Volkswagen, Toyota, General Motors, Alphabet (the parent company of Google), Samsung Electronics, Costco, and Microsoft. Nike and Starbucks failed to make the top 100 in 2022 (*Fortune*, 2022). Even when transnational corporations have a clear national base, they are oriented toward global markets and global profits.

As we saw in Chapter 14, the combined revenues of the world's 500 largest transnational corporations totaled $37.8 trillion in 2022, equivalent to 37 percent of the $102 trillion in goods and services produced by the entire world (derived from IMF, 2023; *Fortune*, 2023). Transnational corporations are instrumental in diffusing new technology around the globe and are major actors in international financial markets. As one group of writers has noted, they are "the linchpins of the contemporary world economy" (Held et al., 1999). A Swiss study of

more than 43,000 transnational corporations found that fewer than 2 percent accounted for four-fifths of the combined monetary value, and the top 50 firms were primarily financial organizations such as banks and giant investment firms (Vitali et al., 2011). While the United States remains home to the largest number of giant transnational corporations, its share has slipped considerably in recent years, particularly with the rise of Asian countries such as Japan, South Korea, and especially China.

Transnational corporations such as Coca-Cola are eager to tap growing markets in countries such as China and India. Corporate leaders break ground on a new plant in the Gansu province of China. Coca-Cola has opened 45 production facilities in mainland China, an investment of over $13 billion, since it entered the market in 1979.

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Transnational corporations became a global phenomenon after World War II. Expansion initially came from firms based in the United States, but by the 1970s European and Japanese firms also began to invest abroad. In the late 1980s and 1990s, transnational corporations expanded dramatically with the establishment of three powerful regional markets: Europe (the European Single Market), Asia-Pacific (the Osaka Declaration, which guaranteed free and open trade by 2010), and North America (the North American Free Trade Agreement, or NAFTA). Since the early 1990s, countries in other areas have also eased restrictions on

foreign investment. By the turn of the twenty-first century, few economies were beyond the reach of transnational corporations. Over the past decade, transnational corporations based in industrialized economies have been expanding their operations in countries in the Global South, as well as in countries in Eastern Europe and countries that were part of the former Soviet Union.

The "electronic economy" also underpins economic globalization. Banks, corporations, fund managers, and individual investors can now shift funds internationally with the click of a mouse. This new ability carries great risks, however. Transfers of vast amounts of capital can destabilize economies and trigger international financial crises. As the global economy becomes increasingly integrated, a financial collapse in one part of the world can have an enormous effect on distant economies. This fact became painfully evident when the once-venerable financial services firm Lehman Brothers filed for bankruptcy in 2008. The collapse of Lehman Brothers, which held an estimated $600 billion in assets, caused financial shock waves throughout the United States and global economies. The Dow Jones dropped by more than 4 percentage points immediately following Lehman's filing for Chapter 11 bankruptcy. Banks and insurers throughout the world, from Scotland to Japan, registered devastating losses as a result (Council on Foreign Relations, 2013). The Dow's drop following Lehman Brothers' collapse was only recently topped in 2020 when the rise of coronavirus infections in the United States led the Dow Jones to drop over 12 percentage points, the largest single drop since the 9/11 attacks in 2001 (Imbert, 2020).

# The Effect of Globalization on Our Lives

Although globalization is often associated with changes within big systems—such as world financial markets, production and trade, and telecommunications—its effects are felt equally strongly in the private realm. Inevitably, our personal lives have been altered as globalizing forces enter into our local contexts, our homes, and our communities through impersonal sources—such as the media, the internet, and popular culture—as well as through personal contact with individuals from other countries and cultures.

As the societies in which we live undergo profound transformations, the institutions that underpin them have become outdated, which is, in turn, forcing a redefinition of the family, gender roles, sexuality, personal identity, our interactions with others, and our relationships to work. The political, economic, social, and technological factors just described are producing a phenomenon without parallel in terms of intensity and scope.

## The Rise of Individualism

In the current age, individuals have much more opportunity to shape their own lives than once was the case. At one time, tradition and custom strongly influenced the path of people's lives. Factors such as social class, gender, ethnicity, and religious affiliation could close off certain avenues for individuals or open up others. The values, lifestyles, and ethics prevailing in one's community provided fixed guidelines for living.

Conditions of globalization, however, bring a new individualism in which people actively construct their own identities. The weight of tradition and established values is lessening as local communities interact with a new global order. The social codes that formerly guided people's choices and activities have significantly loosened. Traditional frameworks of identity are dissolving; new patterns of identity are emerging. Globalization is forcing people constantly to respond and adjust to the changing environment; as individuals, we now evolve within the larger context. Even small choices in daily life—what to wear, how to spend leisure time, and how to care for our health and our bodies—are part of an ongoing process of creating and re-creating our self-identities.

## Work Patterns

Although we may regard work as a chore or a necessary evil, it is undeniably a crucial element in our lives. Not only our jobs but also many other aspects of our existence—from our friends to our leisure pursuits—are shaped by our work patterns.

Globalization has unleashed profound transformations within the world of work. New patterns of international trade and the move to a knowledge economy have significantly altered long-standing employment patterns. Many traditional industries have become obsolete or are losing their

share of the market to competitors abroad whose labor costs are lower than in industrialized countries. Global trade and new forms of technology have affected traditional manufacturing communities, where industrial workers have been left unemployed and without the skills required by the knowledge-based economy. These communities are facing new social problems, including long-term unemployment and rising crime rates, as a result of economic globalization.

If at one time people's working lives were dominated by employment with one employer over several decades—the so-called job-for-life framework—today, more individuals are creating their own career paths. Often this process involves changing jobs several times over the course of a career, building up new skills and abilities, and transferring them to diverse work contexts. Standard patterns of full-time work are dissolving into more flexible arrangements: working from home via information technology; job sharing; short-term consulting projects; flextime; and so forth (Kalleberg, 2003). While flexibility affords new opportunities for some, for most it means greater uncertainty. Job security and attendant health care and retirement benefits have largely become things of the past.

The entrance of women into the workforce in large numbers has strongly affected the personal lives of people of both sexes. Expanded professional and educational opportunities have led many women to put off marriage and children until after they have begun a career. Also, many women return to work shortly after having children, instead of remaining at home. These shifts have required important adjustments within families, in terms of the domestic division of labor, the role of men in child-rearing, and the emergence of more family-friendly work policies to accommodate the needs of dual-earner households. Tech companies such as Meta, Amazon, Microsoft, Snap, and Netflix all expanded their parental leave policies in recent years; Meta now offers its employees 20 weeks of paid parental leave.

## Popular Culture

The cultural effects of globalization have received much attention. Images, ideas, goods, and styles are now disseminated worldwide more rapidly than ever. Trade, new information technologies, the international media, and global migration have all promoted the free movement of

culture across national borders. Many people believe that we now live in a single information order—a massive global network where information is shared quickly and in great volumes. A simple example illustrates this point.

The top-grossing film of all time, to date earning $2.9 billion at the box office, was the 2009 film *Avatar*, a 3D science-fiction epic in which a greedy Earth-based corporation threatens to destroy a lush forest on the habitable moon Pandora, along with the humanlike Na'vi who live there in peaceful harmony with nature, to obtain the precious mineral called (appropriately) "unobtainium." Three-quarters of the film's revenues came from outside the United States—like many cultural products, the film successfully cut across national boundaries and became a truly international phenomenon. Its 2022 sequel—*Avatar: The Way of Water*—has already grossed $2.3 billion. *Titanic*, the Avenger films, and the many incarnations of Star Wars and Spider-Man have all enjoyed worldwide success (*Fortune*, 2023). These films reflect Hollywood's continued dominance in the global film industry; its lavish spending on dazzling state-of-the-art special effects results in films with universal appeal. Furthermore, in the case of the two Avatar films, the stories have resonated with both widely shared romantic yearnings (in the original film, a human male, occupying the body of an avatar, finds true love with an 8-foot-tall blue-skinned Na'vi woman) and growing environmentalist concerns (evil corporations threaten an ecological paradise).

American films such as *Star Wars: The Rise of Skywalker* dominate the global box office. Does this amount to cultural imperialism?

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Western-made films and television programs, which dominate global media, advance political, social, and economic agendas that reflect a specifically Western worldview. Some people worry that globalization is fostering a global culture in which the values of the most powerful and affluent—in this instance, Hollywood filmmakers—overwhelm local customs and tradition. According to this view, globalization is a form of cultural imperialism in which Western values, styles, and outlooks smother individual national cultures. Others, in contrast, have linked globalization to a growing differentiation in cultural traditions and forms. India's film industry (which includes the popular Bollywood films) grew to over 189 billion rupees ($2.3 billion) in 2019; while it collapsed during Covid-19 lockdowns, it had rebounded by 2022 and is predicted to reach $2.8 billion by 2025 (Basuroy, 2023). China's film industry grossed 30 billion yuan ($4.2 billion) in 2022; before the pandemic and China's mandatory lockdowns, it had been twice as large (Thomala, 2023). India and China's large film industries, however, reflect the size of their national markets; they are not nearly as global as the North American film industry (U.S. and Canada), which totaled $7.4 billion in 2022 (Statista, 2023a).

# Globalization and Risk

The consequences of globalization are far-reaching, affecting virtually all aspects of the social world. Yet, because globalization is an open-ended and internally contradictory process, it produces outcomes that are difficult to predict and control. Another way of thinking of this dynamic is in terms of risk. Many of the changes wrought by globalization present new forms of risk. Unlike risks from the past, which had established causes and known effects, today's risks are incalculable in origin and indeterminate in their consequences.

## The Spread of "Manufactured Risk"

Humans have always had to face risks, but today's risks are qualitatively different from those of earlier times. Until recently, human societies were

threatened by external risk from the natural world—dangers such as drought, earthquakes, famines, and storms. Today, however, we increasingly face various types of manufactured risk—risks created by the effect of our own knowledge and technology on the natural world. Many current environmental and health risks are the outcomes of our own interventions in nature.

**Environmental Risks** One of the clearest illustrations of manufactured risk involves threats posed to the natural environment (see previous discussion and Chapter 19). A consequence of accelerating industrial and technological development has been the steady spread of human intervention in nature—for example, through urbanization, industrial production and pollution, large-scale agricultural projects, the construction of dams and hydroelectric plants, and nuclear power. The collective outcome of such processes has been widespread environmental destruction whose precise cause is indeterminate and whose consequences are difficult to calculate.

In the globalizing world, ecological risk takes many forms. Concern over global warming has been mounting in the scientific community; it is now generally accepted that earth's temperature has been increasing due to the buildup within the atmosphere of greenhouse gases—a by-product of human-made processes such as deforestation and the burning of fossil fuels. The potential consequences of global warming are devastating: If polar ice caps continue to melt at the current rate, sea levels will rise and may threaten low-lying landmasses and their human populations. Changes in climate patterns have been cited as possible causes of the severe floods that afflict low-lying countries such as Bangladesh; the record number of severe hurricanes that sweep through the Atlantic and Gulf of Mexico with devastating effects; and wildfires that routinely consume millions of acres of forest and thousands of homes, whether it be in Europe, California, Hawaii, or Canada. Because environmental risks are diffuse in origin, addressing them requires global cooperation. As we saw earlier in this chapter, such cooperation is more easily pledged than achieved.

**Health Risks** Lately, the dangers posed to human health by manufactured risks have attracted great attention. The media and public health campaigns, for example, urge people to limit their exposure to harmful ultraviolet rays and apply sunscreen to prevent burning. Sun exposure has been linked to a heightened risk of skin cancer, possibly due to the

depletion of the ozone layer—the layer of earth's atmosphere that normally filters out ultraviolet light. Because of the high volume of chemical emissions produced by human activities and industry, the concentration of ozone in the atmosphere has been diminishing, and, in some cases, ozone holes have opened up. While the so-called ozone hole increased throughout the latter part of the twentieth century, depletion has largely halted during the last quarter century, thanks to the phasing out of ozone-depleting substances under the 1987 Montreal Protocol, a global agreement to protect the stratospheric ozone layer by phasing out the production and consumption of ozone-depleting substances (European Environment Agency, 2023).

Demonstrators march in the streets of Portland, Oregon, as part of an international protest against Monsanto and the use of GMOs.

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Many examples of manufactured risk are linked to food, because advances in science and technology have heavily influenced modern farming and food production techniques. For example, chemical pesticides and herbicides are widely used in commercial agriculture, and chickens, pigs, and many other animals raised for food are pumped full of hormones and antibiotics. Some people have suggested that such farming techniques compromise food safety and could adversely affect humans. One controversy has raised widespread public concern: the debate over genetically modified organisms (GMOs). The first GMO food that was authorized by the U.S. Food and Drug Administration (FDA) for sale in

the United States was the Flavr Savr tomato, genetically engineered to slow its ripening time, making it less likely to soften and rot if it sat on a shelf (or in long-distance transport) for a length of time (U.S. FDA, 2023). Some of the world's leading chemical and agricultural manufacturers of pesticides and herbicides realized that GMOs could not only improve the shelf-life of foods, but also make plants resistant to destructive insects and plant viruses, as well as more tolerant of the herbicides used to control weeds (U.S. FDA, 2022b). The American firm Monsanto was the leader in developing much of the new technology. Monsanto bought up seed companies, sold off its chemical division, worked to bring the new crops to market, and launched a gigantic advertising campaign promoting the benefit of its genetically modified crops to farmers and consumers. At one time Monsanto accounted for four-fifths of all GMO seeds planted in the world; it was acquired by Bayer in 2018 (Canadian Biotechnology Action Network, 2022). Today, six companies reportedly control nearly three-fifths of the global seed market (ETC Group, 2022).

By 2020, GMO crops were well established throughout the world. In the United States alone, more than 90 percent of all soybeans, corn, cotton, sugar beets, and canola planted are GMOs, and more than 95 percent of animals used for meat and dairy eat GMO crops (U.S. FDA, 2022a). Proponents of GMOs argue that they vastly increase the food supply, a feature that is badly needed for a growing world population, many of whom suffer from hunger and malnourishment (International Service for the Acquisition of Agri-biotech Applications, 2022). Opponents argue that the long-term effects of GMOs remain uncertain and that they have led to the replacement of small-scale farmers by corporate agribusiness that can afford GMO seeds and their required fertilizers. The rise of organic foods is one popular response; another is the requirement of GMO labels on products, so consumers can decide whether to buy GMO products (Center for Food Safety, 2023).

## The Global "Risk Society"

Global warming, the debate over genetically modified foods, and other manufactured risks present new choices and challenges. Individuals, countries, and transnational organizations must negotiate risks as they make choices about how to live and conduct business. Because there are no definitive answers about the causes and outcomes of such risks, this

endeavor can be bewildering. Should we use food and raw materials if their production or consumption might harm our health and the natural environment?

German sociologist Ulrich Beck (1992) sees these risks contributing to a global "risk society." As technological change progresses and produces new forms of risk, we must constantly respond and adjust to these changes. The risk society, he argues, is not limited to environmental and health risks; it includes a series of interrelated changes within contemporary social life: shifting employment patterns, heightened job insecurity, the declining influence of tradition and custom on self-identity, the erosion of traditional family patterns, and the democratization of personal relationships. Because personal futures are much less fixed than they were in traditional societies, decisions of all kinds present risks. Getting married, for example, is a riskier endeavor today than when marriage was a lifelong institution. Decisions about educational qualifications and career paths can also feel risky: It is difficult to predict what skills will be valuable in an economy that is changing so rapidly. According to Beck (1995), an important aspect of the risk society is that its hazards are not restricted spatially, temporally, or socially. Today's risks have global, not merely personal, consequences. Many forms of manufactured risk, such as those concerning human health and the environment, cross national boundaries.

# Globalization and Inequality

Beck and other scholars have identified risk as one of the main outcomes of globalization and technological advance. Yet globalization is generating other important challenges because it has different effects for different regions, countries, and peoples—and some of its consequences are not benign. Next to mounting ecological problems, the expansion of inequalities within and between societies is one of the most serious challenges facing the world today.

The majority of the world's wealth is concentrated in the industrialized countries of the Global North, whereas countries in the Global South suffer from widespread poverty, overpopulation, inadequate educational and health care systems, and crippling foreign debt. The disparity between the Global North and the Global South widened steadily over the

course of the twentieth century and is now the largest it has ever been. A recent report on global wealth shows that global inequality is at extreme levels: In 2021, the richest 1 percent possessed nearly half of the world's wealth (46 percent), leaving the rest of global wealth (54 percent) for the remaining 99 percent (Shorrocks et al., 2022b).

These vast disparities in economic well-being are all the more jarring when daily income is considered. The World Bank reports that the percentage of the world's population living in extreme poverty, which it currently defines as living on less than $2.15 a day, has declined steadily over the past four decades, from 44 percent in 1981 to 9 percent in 2019 (World Bank, 2023a). While this represents a substantial decline in the percentage of global poor, it is important to remember that world population has increased by nearly three-quarters over the same period, which means that some 700 million people in the world remain mired in extreme poverty. Furthermore, many of the world's gains in poverty reduction have resulted from economic growth in the world's two largest economies, China and India, which together account for more than a third of the world's total population. A majority of the world's poor live in Africa, and extreme poverty is clustered in sub-Saharan Africa, which accounts for more than half (56 percent) of the world's extreme poor (World Bank, 2023b).

In much of the Global South, levels of economic growth and output over the past century have not kept up with the rate of population growth, whereas the level of economic development in industrialized countries has far outpaced it. These opposing tendencies have caused a marked divergence between the richest and poorest countries. The United States, with 4 percent of the world population, has the largest share of global wealth (30 percent). China accounts for both 18 percent of the global population and 18 percent of total wealth; India also has 18 percent of the world population, but has only 3 percent of total wealth; and Africa, with 17 percent of the world population, has only 1.3 percent of total wealth (Shorrocks et al., 2022b).

Globalization seems to be exacerbating these trends by further concentrating income, wealth, and resources within a small core of countries. The expansion of global trade has been central to this process, although not all countries in the Global South have managed to benefit from the overall rapid growth, and the process of integration into the global economy has been uneven. Some countries—such as the East

Asian economies, Chile, India, and Poland—have fared well, with significant growth in exports. Other countries—such as Russia, Venezuela, and most of sub-Saharan Africa—have seen few benefits from expanding trade and globalization (World Bank, 2023d). There is a danger that many of the countries most in need of economic growth will be left farther behind as globalization progresses.

Many scholars see free trade as the key to economic development and poverty relief. Organizations such as the WTO work to liberalize trade regulations and reduce trade barriers. Free trade across borders is viewed as a win-win proposition for countries in both the Global North and South. While the industrialized economies are able to export their products to markets worldwide, many experts claim that countries in the Global South will benefit by gaining access to world markets. This, in turn, would improve their prospects for integration into the global economy. But many are now challenging this belief, since free trade has also resulted in the loss of millions of U.S. jobs to low-wage countries.

## The Campaign for Global Justice

Not everyone agrees that free trade is the solution to poverty and global inequality. In fact, many critics argue that free trade is a one-sided affair that benefits those who are already well off, leads to massive job loss of industrial workers in advanced economies, and exacerbates poverty and dependency within the Global South. During the 2016 presidential primary campaigns, Democrat Bernie Sanders and Republican Donald Trump seemed to agree on just one thing: Free trade agreements such as the proposed Trans-Pacific Partnership (TPP) were costing Americans their jobs. As president, Trump doubled down on his campaign pledge to rethink all trade agreements: He pulled the United States out of the TPP and renegotiated the North American Free Trade Agreement (NAFTA) with Mexico and Canada, renaming it (with few changes) the United States–Mexico–Canada Agreement (USMCA).

Recently, much of this criticism has focused around the WTO, which is at the forefront of efforts to increase global trade. In 1999, more than 50,000 people from around the world took to the streets of Seattle to protest during the WTO's Millennium Round of trade talks. Trade unionists, environmentalists, human rights campaigners, antinuclear activists, farmers, and representatives from hundreds of local and

international nongovernmental organizations joined forces to voice their frustration with the WTO—an organization many see as favoring economic imperatives over all other concerns, including human rights, labor rights, the environment, and sustainable development. Negotiators from the WTO's 134 member states—the number of members has since risen to 164—had come together to discuss measures to liberalize conditions for global trade and investment in agriculture and forest products, among other issues. Yet the talks broke off early with no agreements reached. The organizers of the protests were triumphant—not only had the demonstrations succeeded in disrupting the talks, but internal disputes among delegates had also surfaced. The Seattle protests were heralded as the biggest victory to date for campaigners for global justice. Since that time, every ministerial meeting of the WTO has faced massive demonstrations by those excluded from the processes of setting the rules for global trade.

Does this campaign represent the emergence of a powerful anti-globalization movement, as some commentators have suggested? Protesters in other cities, such as London and Washington, D.C., argue that free trade and economic globalization further concentrate wealth in the hands of a few, while increasing poverty for the majority of the world's population. Most of these activists agree that global trade is necessary and potentially beneficial for national economies, but they claim that it needs to be regulated by different rules: trade rules oriented toward protecting human rights, the environment, labor rights, and local economies—not toward ensuring larger profits for already rich corporations. The protesters claim that the WTO is an undemocratic organization dominated by the interests of the world's richest nations, particularly the United States. Although the members of the WTO include many countries in the Global South, many have no influence over the organization's policies because the richest nations set the agenda. Poorer nations have fewer resources, in terms of money and trained personnel, to confront the highly complex issues related to international trade.

Such imbalances have very real consequences. For example, although the WTO has insisted that countries in the Global South open their markets to imports from industrialized countries, it has allowed industrialized countries to maintain high barriers to agricultural imports and provide vast subsidies for their domestic agriculture production to protect their

own agricultural sectors. In 2021, the U.S. government spent $28.5 billion on subsidies to boost the income of crop and livestock farmers (USAFacts, 2023). The EU spends $65 billion each year on its farmers, and the farm budget accounts for up to 40 percent of the EU's yearly expenditure (Gebrekidan et al., 2019). This means that the world's poorest (and predominantly agricultural) countries do not have access to the large markets for agricultural goods in industrialized countries. This issue has confounded the expansion of WTO rules covering trade in services, foreign investment, government procurement, and other areas. At the 2003 WTO ministerial meeting in Mexico, the "Group of 21" countries in the Global South, led by Brazil and India, refused to consider the expansion of WTO rules until the United States and the EU eliminate subsidies for agriculture production and allow greater access to other agriculture markets, such as cotton. The issue of agriculture subsidies still has not been resolved. Although the 2015 WTO Ministerial Conference included a commitment to abolish subsidies for farm exports, the issue of subsidies Europe and the United States use to support their farmers continues to hamper WTO ministerial meetings (WTO, 2023).

Workers in New Delhi participate in an anti-WTO protest. What are some of the criticisms leveled at the WTO?

A similar divide exists over the protection of intellectual property rights —an issue monitored by a WTO multilateral agreement called TRIPS (Trade-Related Aspects of Intellectual Property Rights). In 2016, high-income countries accounted for more than 50 percent of patent applications. Just five patent offices (United States, China, Japan, South Korea, and the European patent office) accounted for nearly 84.5 percent of patent applications (World Intellectual Property Organization, 2018). The concept of intellectual property rights, however, is alien to the Global South. Recently, there has been a significant increase in the number of patent claims as biotechnology companies and research institutes push to control and "own" more forms of knowledge, technology, and biodiversity. Many samples of plant material, for example, have been taken from biodiverse areas such as rain forests and developed by pharmaceutical companies into profitable—and patented—medicines. Local knowledge about the medicinal uses of the plants is often used in developing and marketing the medicines, yet the Indigenous people receive no compensation for their contribution. As industrialized countries within the WTO push to strengthen intellectual property laws, many people in the Global South argue that such a move works against the needs of their countries. Research agendas are dictated by profit interests, not human interests, and valuable forms of technology may end up inaccessible to poorer countries that could benefit from their use.

Another criticism of the WTO is that it operates in secret and is not accountable to citizens who are affected by its decisions. In many ways, this criticism is valid. Trade disputes between members of the WTO are decided behind closed doors by a committee of "experts" who are appointed rather than elected. When a decision is handed down, it is legally binding on all member states and enforceable through a mechanism that authorizes WTO member nations to enact punitive trade policies unless the losing nation complies with the decision.

The WTO can also challenge or override laws that are seen as barriers to trade. This includes national laws or bilateral agreements designed to protect the environment, conserve scarce resources, safeguard public health, or guarantee labor standards and human rights. For example, the WTO has ruled against the EU's ban on U.S. hormone-treated beef (because of its possible links to cancer) and has challenged a law passed in Massachusetts that prohibits companies from investing in Myanmar (formerly known as Burma) because of its government's human rights

violations. In another instance, the United States and the EU attempted to use the TRIPS provision to block the importation of inexpensive generic HIV/AIDS medication into countries in sub-Saharan Africa, whose populations are being devastated by this epidemic. This move produced worldwide public outrage, which forced the WTO to reconsider its rules that regulate patent rights when public health is at stake.

A final challenge to the WTO arises from an entirely different source: the current trade war between the United States and China, and the growing nationalism that openly emphasizes the centrality of national interest over global principles of free trade. China has filed a trade dispute at the WTO, claiming that the U.S. effort to block sales to China of advanced computer chips and chip-making equipment is a protectionist violation of WTO free trade rules (He, 2022). The United States has voiced concern over "China's state-led, non-market policies and practices and their harmful impact on the U.S. economy and U.S. workers and businesses," which it views as a form of industrial policy providing "substantial government guidance, massive financial resources and favorable regulatory support to Chinese industries," in clear violation of WTO rules (U.S. Trade Representative, 2022). It remains an open question whether the current "Chinese model" for state-led economics will prevail over what was once seen as the "Washington Consensus" on the primacy of free trade.

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**CONCEPT CHECKS**

1. **How has technology facilitated the compression of time and space?**
2. **What are the three causes of increasing globalization?**
3. **What effect does globalization have on our everyday lives?**
4. **Why is globalization associated with new forms of risk? What are the new forms of risk?**
5. **Briefly describe the debate over the role that free trade plays in global inequality.**

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# Glossary

international governmental organizations (IGOs)

International organizations established by treaties between governments for purposes of conducting business between the nations making up their membership.

international nongovernmental organizations (INGOs)

International organizations established by agreements between the individuals or private organizations making up their membership.

transnational (or multinational) corporations

Business corporations located in two or more countries.

external risk

A danger that springs from the natural world and is unrelated to the actions of humans. Examples of external risk include droughts, earthquakes, famines, and storms.

manufactured risk

A danger that is created by the impact of human knowledge and technology on the natural world. Examples of manufactured risk include global warming and genetically modified foods.

# 4 UNANSWERED QUESTIONS

**Evaluate the notion that social change is ushering us into a postindustrial or postmodern stage of social organization. Understand why new forms of global governance are needed to address the risks, challenges, and inequalities produced by globalization.**

We are in the midst of a global transformation, so it is difficult to see where we are headed and how we can manage these changes. We face important sociological debates over what comes next and what steps we should take to best address the social, economic, and environmental challenges that have resulted from globalization. In this section, we consider differing views on what comes after modern industrialism and how globalization's rough edges might be best softened.

## What Comes After Modern Industrial Society?

Where is social change leading us today? If social theorists do not agree on the nature of globalization, they also differ on where these changes are leading us. Here, we examine two competing perspectives: the notion that we are a postindustrial society, and the idea that we have reached a radically different postmodern period in which old concepts and understandings no longer apply.

Some observers have suggested that what is occurring today is a transition to a new society, one that is no longer primarily based on industrialism. We are entering, they claim, a phase of development beyond the industrial era. The term postindustrial society was first employed a half century ago by U.S. sociologist Daniel Bell (1976) and French sociologist Alain Touraine (1974)—the *post* (meaning "after") referring to the sense that we are moving beyond the old forms of industrial development. As we saw in Chapter 14, this supposedly new social order, in which the economy is no longer based on factory

production, is today more likely to be referred to as an *information age*, *new economy*, and *knowledge economy*.

We now live in an information society in which knowledge and information rather than manufactured goods are the chief output of the U.S. Economy.

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The diversity of terms reflects the countless ideas put forward to interpret current social changes. But one consistent theme is the significance of information or knowledge in the society of the future. Our way of life throughout the nineteenth and twentieth centuries, based largely on machine power (the manufacture of material goods in factories), is being displaced by one in which information underlies the production system.

In *The Coming of Post-Industrial Society*, Bell (1976) argued that the postindustrial order is distinguished by the growth of service occupations at the expense of jobs that produce material goods. The blue-collar worker is no longer the most essential type of employee. White-collar (clerical and professional) workers outnumber blue-collar (factory) workers, with professional and technical occupations growing fastest of all. People working in higher-level white-collar occupations specialize in the production of information and knowledge. The production and control of what Bell calls "codified knowledge"—systematic, coordinated information—is society's main productive resource. Those

who create and distribute this knowledge—scientists, computer specialists, economists, engineers, and professionals of all kinds—increasingly become the leading social groups, replacing industrialists and entrepreneurs. On the level of culture, there is a shift away from the work ethic characteristic of industrialism; people are freer to innovate and enjoy themselves in both their work and their domestic lives.

Even as Bell was arguing that societies had entered a postindustrial stage, other scholars were arguing that "postindustrial" did not adequately capture the changes that were occurring. Early scholars of postmodernity argued that not only did the current developments signal the end of the era of industrialism, but they signaled the end of modern society, ushering in a new postmodern age with radically different experiences and understandings. What is normally seen as "real" is best understood as a set of myths constructed out of the words we use; the ways in which we see the world is shaped by our experiences. Since those experiences differ, so do our notions of reality. All claims must therefore be "deconstructed": Who made these claims? Under what circumstances? For what purposes? The "master narratives" we have long used—such as our belief in progress, reason, science, and even our ability to control the world—no longer hold. All is in flux; all is up for interpretation (Denzin, 1986).

While the impact of mass media was an early focus of postmodern scholars, subsequent developments would seem to reinforce their argument. Globalization, information technology, artificial intelligence, social media, climate change, and global pandemics all call into question many of the beliefs that were associated with modernity. How can we determine what is real at a time when postmodern versions of reality proliferate online from TikTok conspiracies to QAnon—where the claim "truth is not truth" has widespread political resonance (Jewel, 2023)?

While both postindustrial and postmodern theorists provide important insights, each has shortcomings as well. The postindustrial notion that creative and challenging white-collar work is replacing highly routinized factory work oversimplifies what is actually happening. While service jobs are replacing factory jobs (most of which are now performed by workers in low-wage countries), much service-sector employment today is just as routinized and unsatisfying as factory work was in the past (and pays much less). Moreover, artificial intelligence now threatens to replace even highly skilled creative jobs. While it is too early to correctly

predict the long-term employment impact of AI software such as Microsoft's ChatGPT or Google's Bard, the professions currently seen as potentially vulnerable include a wide range of media jobs (such as content creators, technical writers, advertising specialists, and journalists); jobs in high tech (such as programmers, software engineers, coders, and data analysts); market research; finance; legal assistants; and —yes—teachers (Mok & Zinkula, 2023). Will your soc professor be replaced by a human-looking bot on your computer?

Postmodern theorists have been criticized by writers such as Ulrich Beck (1992) and Anthony Giddens (1990), who challenge the notion that societies have become so radically different that any attempt to understand general processes in the social world is doomed, along with the notion that we cannot change the world for the better. Postmodern theory is useful in understanding how contemporary societies are becoming globalized, while everyday life is breaking free from tradition and custom. But these changes should not spell the end of social and political reform. Values, such as a belief in the importance of social community, equality, and caring for the weak and vulnerable, are still very much alive worldwide.

# Is There a Need for Global Governance?

Globalization has brought with it violence, internal conflict, and chaotic transformations in many areas of the world. The existing political structures and models appear unequipped to manage the risks, inequalities, and challenges that transcend national borders. Individual governments cannot control the spread of HIV/AIDS or Covid-19, counter the effects of global warming, or regulate volatile financial markets (see Table 20.2). Critics of globalization see global organizations such as transnational corporations or the WTO as responsible for the effects of globalization. Others see opportunities to harness globalizing forces in the pursuit of greater equality, democracy, and prosperity.

**Table 20.2 APPLYING SOCIOLOGY TO GLOBALIZATION IN A CHANGING WORLD**

| CONCEPT | APPROACH TO UNDERSTANDING GLOBALIZATION IN A CHANGING WORLD | CONTEMPORARY APPLICATION |
|---|---|---|
| **Time-space compression** | Technological changes that reduce the time required to cover a given distance, thereby altering the experience of time, and increasing the possibility of human activity over ever-greater distances. | Advances in transportation and telecommunication, which have made it possible to cross the United States coast-to-coast in five to six hours by air (as opposed to five to six months by horse a century ago)—or to have a face-to-face conversation with a friend a half a world away by smartphone (something that would have been unthinkable a century ago). |
| **Manufactured risk** | Risks that are created by the effects of our own knowledge and technology on the natural world (as opposed to external risks from the natural world that do not result from human activity). Many current environmental and health risks are the outcomes of our own interventions into nature. | Global warming and climate change; genetically modified foods; global pandemics such as Covid-19. |

| | | |
|---|---|---|
| **Postindustrial society** | Society is increasingly based on the production of information rather than on manufactured goods, resulting in social and cultural changes as profound as those that followed the Industrial Revolution some two centuries ago. | The internet, social media, smartphones, virtual reality, artificial intelligence, virtual meetings (and relationships); the growth of the service economy. |

Protesters against the WTO and other international financial institutions argue that exuberance over global economic integration and free trade is forcing people to live in an economy rather than a society. Many are convinced that such moves will further weaken the economic position of poor societies by allowing transnational corporations to operate with few or no safety and environmental regulations. Commercial interests, they claim, are increasingly taking precedence over concern for human well-being. Not only within countries in the Global South, but in industrialized ones as well, the call is for greater investment in "human capital" (public health, education, and training) if global divisions are not to deepen. In their view, a key challenge for the twenty-first century is to ensure that globalization works for people everywhere, not only for those who are already well placed to benefit from it.

Walden Bello is a sociologist, member of the Philippine Parliament, and anti-globalization activist. Bello (2005) has called for deglobalization—reducing global interdependence by rendering economies less dependent on trade and global supply chains, and instead making them as local as

possible. Bello envisions democratically controlled local economies, where greater equality, rather than profit maximization, would be the goal. This goal would be achieved by subjecting key economic decisions to democratic choice rather than the marketplace. Bello's deglobalized world would boast income redistribution, community cooperatives, small and medium-size businesses, and state enterprises—but no transnational corporations.

Bello regards deglobalization as necessary on ecological as well as moral grounds. He argues that today's global economy, where products move thousands of miles, is in large part responsible for fossil fuel depletion, pollution, greenhouse gases, and global climate change. As he sees it,

> We must no longer think simply in terms of neutralizing the multilateral agencies that form the outer trenches of the system but of disabling the transnational corporations that are fortresses and the earthworks that constitute the core of the global economic system. I am talking about disabling not just the WTO, the IMF, and the World Bank but the transnational corporation itself. And I am not talking about a process of "reregulating" the TNCs but of eventually disabling or dismantling them as fundamental hazards to people, society, the environment, to everything we hold dear. (Bello, 2005)

Bello's views on deglobalization would be regarded as completely wrongheaded by those who argue that global capitalism not only is here to stay, but has resulted in higher living standards for hundreds of millions of people. Even those who share many of his criticisms of globalization would most likely regard his call for deglobalization as utopian. They would argue that the challenge is to make globalization work better for everyone—to establish institutions that would more effectively regulate the global economy, instead of leaving it to the marketplace. The Nobel Prize–winning economist Joseph Stiglitz (2003, 2007, 2010) and the philanthropist George Soros (2000, 2005, 2009) have both called for reforming the current system, rather than overturning it completely.

New forms of global governance could help promote a cosmopolitan world order in which transparent rules and standards for international behavior, such as the defense of human rights, are established and observed. Yet the existing institutions of global governance hardly seem up to the task of reform: The UN and its affiliated organizations, such as

the International Labour Organization, have little or no enforcement power, while the WTO, as presently constituted, seeks to promote free trade and economic deregulation (although Stiglitz and others have proposed reforms that could make it more responsive to social concerns).

Erik Olin Wright's 2012 presidential address to the American Sociological Association called for "envisioning real utopias"—nonreformist reforms that would move us incrementally toward a more egalitarian world. In his book *Envisioning Real Utopias* (2010), Wright critically evaluates the pros and cons of numerous proposals for reform, as well as specific organizations (such as worker-owned cooperatives or a guaranteed minimal income) that provide concrete examples of what might be possible. This is important, he argues, because

> most people in the world today, especially in the economically developed regions of the world, no longer believe in this possibility. Capitalism seems to most people part of the natural order of things. . . . This book hopes to contribute to rebuilding a sense of possibility for emancipatory social change by investigating the feasibility of radically different kinds of institutions and social relations that could potentially advance the democratic egalitarian goals historically associated with the idea of socialism. In part this investigation will be empirical, examining cases of institutional innovations that embody in one way or another emancipatory alternatives to the dominant forms of social organization. In part it will be more speculative, exploring theoretical proposals that have not yet been implemented but nevertheless are attentive to realistic problems of institutional design and social feasibility. The idea is to provide empirical and theoretical grounding for radical democratic egalitarian visions of an alternative social world. (Wright, 2010)

The move toward global governance and more effective regulatory institutions, and the search for alternatives to the present system, are clearly warranted at a time when global interdependence and the rapid pace of change link all people together more than ever before. There is clearly an urgent need for greater global cooperation on issues such as climate change and pandemics, which threaten all of us yet are beyond the control of single governments. Should such changes take the form of a move toward less global interdependence, as Bello and the global justice movement envision? Can they be achieved by reforming the current system, as Soros, Stiglitz, and Wright call for? Or do we need

something else entirely, such as a truly global governance system in which states relinquish some of their sovereignty, as exemplified by the 27 member states of the European Union?

The possibilities are open to discussion and debate. It is not beyond our abilities to reassert our will on the social world. Indeed, such a task appears to be both the greatest necessity and the greatest challenge facing human societies in the twenty-first century.

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**CONCEPT CHECKS**

1. **What is the "postindustrial society"?**
2. **What is the "postmodern era"? What is the main criticism of this concept?**
3. **What are some examples of a move toward a global democratic structure?**
4. **Summarize optimistic versus pessimistic views toward global governance.**

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# Glossary

postindustrial society
: A notion advocated by those who believe that processes of social change are taking us beyond the industrialized order. A postindustrial society is based on the production of information rather than the production of material goods. According to postindustrialists, we are currently experiencing a series of social changes as profound as those that initiated the industrial era some 200 years ago.

deglobalization
: The reduction of global interdependence by making economies as local as possible.

# THE BIG PICTURE

# Chapter 20

## Globalization in a Changing World

**Exercises:** Thinking Sociologically

1. Discuss the many influences on social change: environmental, political, and cultural factors. Summarize how each element can contribute to social change.
2. According to this chapter, we now live in a society where we increasingly face various types of manufactured risks. Briefly explain what these risks consist of. Do you think the last decade has brought us any closer to or further away from confronting the challenges of manufactured risks? Explain.

# BASIC CONCEPTS p. 837

## Learning Objectives

Recognize that numerous factors influence social change, including the physical environment, political organization, culture, and economic factors.

### Terms to Know

hybridity • social change • environmental globalization • political globalization • economic globalization • cultural globalization

### Concept Checks

1. What are the most important political factors that influence social change?
2. Name two examples of cultural factors that may influence social change.
3. How does industrial capitalism affect social change?

## Current Theories: Is Globalization Today Something New—or Have We Seen It All Before? p. 845

### Learning Objectives

Understand the debates among skeptics, hyperglobalizers, and transformationalists over whether globalization differs radically from anything in human history.

### Concept Checks

1. Compare and contrast how the skeptics, the hyperglobalizers, and the transformationalists explain the phenomenon of globalization.
2. How might skeptics, hyperglobalizers, and transformationalists interpret differently the growing global prominence of China?

## RECENT RESEARCH ON GLOBALIZATION AND SOCIAL CHANGE p. 849

## Learning Objectives

Recognize that globalization is not solely an economic phenomenon but rather the combined effect of technological, political, and economic changes. Understand how globalization has contributed to the rise of individualism, reshaped work patterns, influenced pop culture, and created new forms of risk and inequality.

## Terms to Know

international governmental organizations (IGOs) • international nongovernmental organizations (INGOs) • transnational (or multinational) corporations • external risk • manufactured risk

## Concept Checks

1. How has technology facilitated the compression of time and space?
2. What are the three causes of increasing globalization?
3. What effect does globalization have on our everyday lives?
4. Why is globalization associated with new forms of risk? What are the new forms of risk?
5. Briefly describe the debate over the role that free trade plays in global inequality.

# UNANSWERED QUESTIONS p. 865

## Learning Objectives

Evaluate the notion that social change is ushering us into a postindustrial or postmodern stage of social organization. Understand why new forms of global governance are needed to address the risks, challenges, and inequalities produced by globalization.

## Terms to Know

postindustrial society • deglobalization

## Concept Checks

1. What is the “postindustrial society”?
2. What is the “postmodern era”? What is the main criticism of this concept?
3. What are some examples of a move toward a global democratic structure?
4. Summarize optimistic versus pessimistic views toward global governance.

# Glossary

hybridity
: A term adopted from biology to convey that cultures are neither wholly isolated nor entirely distinct, but instead constantly borrow from one another.

social change
: Alteration in basic structures of a social group or society. Social change is an ever-present phenomenon in social life but has become especially intense in the modern era. The origins of modern sociology can be traced to attempts to understand the dramatic changes shattering the traditional world and promoting new forms of social order.

environmental globalization
: The ways in which human actions have environmental impacts with planetary effects.

political globalization
: The growing influence of international governmental institutions that enact—and seek to enforce—laws and regulations that are binding on the countries that ratify them.

economic globalization
: The cross-border flow of investment, as well as the production of goods and services, money and finance, and science and technology.

cultural globalization
: The spread of cultural values, beliefs, and norms across borders.

international governmental organizations (IGOs)
: International organizations established by treaties between governments for purposes of conducting business between the nations making up their membership.

international nongovernmental organizations (INGOs)

International organizations established by agreements between the individuals or private organizations making up their membership.

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deglobalization

The reduction of global interdependence by making economies as local as possible.

# Glossary

Words in **bold** type within entries refer to terms found elsewhere in the glossary.

**AARP:** U.S. advocacy group for people age 50 and over; formerly the American Association of Retired Persons.

**absolute poverty:** A state of poverty in which one lacks the minimal requirements necessary to sustain a healthy existence.

**abstract and concrete attitudes:** Abstract attitudes are ideas that are consistent with mainstream societal views, while concrete attitudes are ideas that are based on actual experience.

**achievement gap:** Disparity on a number of educational measures between the performance of groups of students, especially groups defined by **gender**, **race**, **ethnicity**, and socioeconomic status.

**"acting White" thesis:** The thesis that Black students do not aspire or strive to get good grades because it is perceived as "acting White."

**activity theory:** A functionalist theory of **aging** that holds that busy, engaged people are more likely to lead fulfilling and productive lives.

**affective individualism:** The belief in romantic attachment as a basis for contracting **marriage** ties.

**affirmative action:** Policies that grant preferential treatment to groups regarded as disadvantaged or subject to **discrimination**.

**age-grade:** The system found in small traditional **cultures** by which people belonging to a similar age group are categorized together and hold similar rights and obligations.

**ageism: Discrimination** or **prejudice** against a person on the grounds of age.

**age-specific birthrates:** Statistical measures representing the number of births within a given **population** per year in relation to age distribution.

**agency:** The ability to think, act, and make choices independently.

**agents of socialization:** Groups or social contexts within which processes of **socialization** take place.

**aging:** The combination of biological, psychological, and social processes that affect people as they grow older.

**aging in place:** A phenomenon in which many rural areas have disproportionately high numbers of older adults because young persons seek opportunities elsewhere and leave the older persons behind.

**agrarian societies:** Societies whose means of subsistence are based on agricultural production (crop growing).

**alienation:** The sense that our own abilities as human beings are taken over by other entities. The term was originally used by Karl Marx to refer to the projection of human powers onto gods. Subsequently, he used the term to refer to the loss of workers' control over the nature and products of their labor.

**Alzheimer's disease:** A degenerative disease of the brain resulting in progressive loss of mental capacity.

**anomie:** A concept first brought into wide usage in sociology by Émile Durkheim to refer to a situation in which social **norms** lose their hold over individual behavior.

**Anthropocene:** A term used to denote the current geological epoch, in which many geologically significant conditions and processes are profoundly altered by human activities.

**anticipatory socialization:** The process whereby we learn about a **social role** in advance of enacting the role.

**apartheid:** The system of racial **segregation** established in South Africa.

**assimilation:** The acceptance of a **minority group** by a majority **population** in which the new group takes on the **values** and **norms** of

the dominant **culture**.

**authoritarianism:** A political system in which the governing bodies or leaders use force to maintain control.

**authority:** A government's legitimate use of **power**.

**automation:** Production processes monitored and controlled by machines with only minimal supervision from people.

**back region:** Areas apart from **front region** performance, as specified by Erving Goffman, in which individuals are able to relax and behave informally.

**biological essentialism:** The view that differences between men and women are natural and inevitable consequences of the intrinsic biological natures of men and women.

**biomedical model of health:** The set of principles underpinning Western medical systems and practices. The biomedical model of health defines diseases objectively, in accordance with the presence of recognized symptoms, and holds that the healthy body can be restored through scientifically based medical treatment. The human body is likened to a machine that can be returned to working order with the proper repairs.

**Black feminism:** A strand of **feminist theory** that highlights the multiple disadvantages of **gender**, **class**, and **race** that shape the experiences of non-White women. Black feminists reject the idea of a single, unified gender oppression that is experienced evenly by all women, and argue that early feminist analysis reflected the specific concerns of White, **middle-class** women.

**body mass index (BMI):** A measure of body fat based on height and weight.

**bourgeoisie:** People who own companies, land, or stocks (shares) and use these to generate economic returns.

**bureaucracy:** A type of **organization** marked by a clear hierarchy of **authority** and the existence of written rules of procedure and staffed by

full-time, salaried officials.

**Capabilities Approach:** An approach to economic development that uses social indicators to emphasize the degree to which people are capable of achieving a life they value, given the opportunities they face.

**capitalism:** An economic system based on the private ownership of **wealth**, which is invested and reinvested in order to produce profit.

**caste:** A social system in which one's social **status** is held for life.

**charismatic:** The inspirational quality of leaders that makes them capable of capturing the imagination and devotion of a mass of followers.

**churches:** Large bodies of people belonging to an established religious **organization**. The term is also used to refer to the place in which religious ceremonies are carried out.

**cisgender:** Individuals whose **gender** identity matches their biological sex. Statistically, this is the most common gender. It would include persons born female who identify as female and persons born male who identify as male.

**citizens:** Members of a political community, having both rights and duties associated with that membership.

**civil inattention:** The process whereby individuals in the same physical setting glance at each other and quickly look away to indicate awareness of each other but not intrusiveness.

**civil rights:** Legal rights held by all **citizens** in a given national community.

**civil religion:** A set of religious beliefs through which a **society** interprets its own history in light of some conception of ultimate reality.

**civil society:** The realm of activity that lies between the **state** and the market, including the **family**, schools, community associations, and noneconomic institutions. Civil society, or civic culture, is essential to vibrant democratic societies.

**class:** Although it is one of the most frequently used concepts in sociology, there is no clear agreement about how the notion of class should be defined. Most sociologists use the term to refer to socioeconomic variations between groups of individuals that create variations in their material prosperity and **power**.

**class system:** A system of social hierarchy that allows individuals to move among classes. The chief bases of class are **income**, ownership of **wealth**, education, **occupation**, and lifestyle.

**clock time:** Time as measured by the clock, in terms of hours, minutes, and seconds, as opposed to measuring it by the rising and setting of the sun.

**cognition:** Human thought processes involving perception, reasoning, and remembering.

**cohabitation:** Two people living together in a sexual relationship of some permanence without being married to each other.

**cohort:** A group of individuals who were born during the same time period, and thus share a similar pattern of historical experiences from childhood to adult life.

**collective action:** Action undertaken in a relatively spontaneous way by a large number of people assembled together.

**collective consumption:** A concept used by Manuel Castells to refer to processes of urban consumption—such as the buying and selling of property.

**colonialism:** The process whereby Western nations established their rule in parts of the world away from their home territories.

**communism:** A social system based on everyone owning the means of production and sharing in the wealth it produces.

**community-based participatory research (CBPR):** A collaborative approach to research that equitably involves community members, researchers, and others in all aspects of the research process.

**community policing:** An approach to policing that emphasizes crime prevention rather than law enforcement to reintegrate policing within the community.

**comparative research:** Research that compares one set of findings on one **society** with the same type of findings on other societies.

**complementary and alternative medicine (CAM):** A diverse set of approaches and therapies for treating illness and promoting well-being that generally fall outside standard medical practices.

**compulsion of proximity:** People's need to interact with others in their presence.

**concrete operational stage:** A stage of cognitive development, as formulated by Jean Piaget, in which the child's thinking is based primarily on physical perception of the world. In this phase, the child is not yet capable of dealing with abstract concepts or hypothetical situations.

**conflict theories of aging:** Arguments that emphasize the ways in which the larger **social structure** helps shape the opportunities available to older adults. Unequal opportunities are seen as creating the potential for conflict.

**conflict theory:** A sociological perspective that emphasizes the role of political and economic **power** and oppression as contributing to the existing social order.

**constitutional monarchy:** A system of government in which a king or queen is largely a figurehead and real **power** rests in the hands of other political leaders.

**continuity theory:** The theory that older adults' well-being is enhanced when their activities are consistent with their personality, preferences, and activities earlier in life.

**contradictory class locations:** Positions in the class structure, particularly routine white-collar and lower managerial jobs, that share characteristics of the class positions both above and below them.

**control theory:** The theory that **crime** is the outcome of an imbalance between impulses toward criminal activity and controls that deter it. Control theorists hold that criminals are rational beings who will act to maximize their own reward unless they are rendered unable to do so through either social or physical controls.

**conurbation:** An agglomeration of towns or cities into an unbroken urban environment.

**conversation analysis:** The empirical study of conversations, employing techniques drawn from **ethnomethodology**. Conversation analysis examines details of naturally occurring conversations to reveal the organizational principles of talk and its role in the production and reproduction of social order.

**core countries:** According to **world-systems theory**, the most advanced industrial countries, which take the lion's share of profits in the world economic system.

**corporate crime:** Offenses committed by large **corporations** in **society**. Examples of corporate crime include pollution, false advertising, and violations of **health** and safety regulations.

**corporations:** Business firms or companies.

**correlation coefficients:** Measures of the degree of correlation between variables.

**countercultures:** Cultural groups within a wider **society** that largely reject the **values** and **norms** of the majority.

**created environment:** An environment made up of constructions established by human beings to serve their needs, derived from the use of man-made **technology**—including, for example, roads, railways, factories, offices, private homes, and other buildings.

**crime:** The result of any action that contravenes the **laws** established by a political **authority**.

**crude birthrates:** Statistical measures representing the number of births within a given **population** per year, normally calculated in terms of the

number of births per 1,000 members. Although the crude birthrate is a useful index, it is only a general measure because it does not specify numbers of births in relation to age distribution.

**crude death rates:** Statistical measures representing the number of deaths that occur annually in a given **population**, normally calculated as the ratio of deaths per 1,000 members. Crude death rates give a general indication of the **mortality** levels of a community or **society**, but they are limited in their usefulness because they do not take into account the age distribution.

**cults:** Fragmentary religious groupings to which individuals are loosely affiliated but that lack any permanent structure.

**cultural appropriation:** The adoption of one cultural group's elements by another cultural group.

**cultural capital:** The accumulated cultural knowledge within a **society** that confers **power** and **status**.

**cultural globalization:** The spread of cultural **values**, beliefs, and **norms** across borders.

**cultural lag:** The idea, introduced by William Ogburn, that changes in cultural **values** and **norms** take time to catch up with technological developments.

**cultural navigators:** People who draw from both their home **culture** and mainstream culture to create an attitude that allows them to succeed.

**cultural relativism:** The practice of judging a **society** by its own standards.

**cultural turn:** Sociology's recent emphasis on the importance of understanding the role of **culture** in daily life.

**cultural universals: Values** or **modes** of behavior shared by all human **cultures**.

**culture:** The **values**, **norms**, and material goods characteristic of a given group. Like the concept of **society**, the notion of culture is widely used in

sociology and the other social sciences (particularly anthropology). Culture is one of the most distinctive properties of human social association.

**culture of poverty:** The thesis, popularized by Oscar Lewis, that poverty is not a result of individual inadequacies but instead the outcome of a larger social and cultural atmosphere into which successive generations of children are socialized. The culture of poverty refers to the **values**, beliefs, lifestyles, habits, and traditions that are common among people living under conditions of material deprivation.

**cybercrime:** Criminal activities by means of electronic **networks** or information **technologies**. Electronic money laundering, personal **identity** theft, electronic vandalism, and monitoring electronic correspondence are all emergent forms of cybercrime.

**cyberspace:** Electronic **networks** of interaction between individuals at different computer terminals.

**deglobalization:** The reduction of global interdependence by making economies as local as possible.

**degree of dispersal:** The range or distribution of a set of figures.

**democracy:** A political system that allows the citizens to participate in political decision making or elect representatives to government bodies, enabling them to directly or indirectly decide the **laws** under which they will live.

**democratic elitism:** A theory of the limits of **democracy**. It holds that in large-scale societies democratic participation is necessarily limited to the regular election of political leaders.

**demographic transition:** A theory that shows how birth and death rates are related to stages of industrial development, with high birth and death rates transitioning to low birth and death rates as a country transitions from a preindustrial to an industrialized economy.

**demography:** The study of **populations**.

**denomination:** A religious **sect** that has lost its revivalist dynamism and become an institutionalized body, commanding the adherence of significant numbers of people.

**dependency culture:** A term popularized by Charles Murray to describe individuals who rely on state welfare provision rather than entering the labor market. The dependency culture is seen as the outcome of the "paternalistic" **welfare state** that undermines individual ambition and people's capacity for self-help.

**dependency ratio:** The ratio of people of dependent ages (children and **older adults**) to people of economically active ages.

**dependency theories:** Marxist theories of economic development that argue that the poverty of low-income countries stems directly from their exploitation by wealthy countries and by the multinational corporations that are based in wealthy countries.

**dependent development:** The theory that poor countries can still develop economically, but only in ways shaped by their reliance on wealthier countries.

**desocialization:** The process whereby people unlearn rules and **norms** upon exiting a particular social world.

**deviance:** Modes of action that do not conform to the **norms** or **values** held by most members of a group or **society**. What is regarded as deviant is as variable as the norms and values that distinguish different **cultures** and **subcultures** from one another. Forms of behavior that are highly esteemed by one group may be regarded negatively by others.

**deviant subculture:** A **subculture** whose members hold **values** that differ substantially from those of the majority.

**diaspora:** The dispersal of an ethnic **population** from an original homeland into foreign areas, often in a forced manner or under traumatic circumstances.

**differential association:** An interpretation of the development of criminal behavior proposed by Edwin H. Sutherland, according to whom

criminal behavior is learned through association with others who regularly engage in **crime**.

**discrimination:** Behavior that denies to the members of a particular group resources or rewards that can be obtained by others. Discrimination must be distinguished from **prejudice**: Individuals who are prejudiced against others may not engage in discriminatory practices against them; conversely, people may act in a discriminatory fashion toward a group even though they are not prejudiced against that group.

**disengagement theory:** A functionalist theory of **aging** that holds that it is functional for **society** to remove people from their traditional **roles** when they become older adults, thereby freeing up those roles for others.

**disestablishment:** A period during which the political influence of established **religions** is successfully challenged.

**division of labor:** The specialization of **work** tasks by means of which different **occupations** are combined within a production system. All **societies** have at least some rudimentary form of division of labor, especially between the tasks allocated to men and those performed by women. With the development of industrialism, the division of labor became vastly more complex than in any prior type of production system. In the modern world, the division of labor is international in scope.

**doubling time:** The time it takes for a particular level of **population** to double.

**dyad:** A group consisting of two persons.

**ecological approach:** In the field of urban analysis, a perspective emphasizing the "natural" distribution of city neighborhoods into areas having contrasting characteristics.

**economic globalization:** The cross-border flow of investment, as well as the production of goods and services, money and finance, and science and **technology**.

**economic interdependence:** In the **division of labor**, the dependence of individuals on others to produce many or most of the goods they need to

sustain their lives.

**economy:** The system of production and exchange that provides for the material needs of individuals living in a given **society**. Economic institutions are of key importance in all social orders. What goes on in the economy usually influences other areas of social life. Modern economies differ substantially from traditional ones because the majority of the **population** is no longer engaged in agricultural production.

**egocentric:** According to Jean Piaget, the characteristic quality of a child during the early years of life. Egocentric thinking involves understanding objects and events in the environment solely in terms of one's own position.

**emerging economies:** Countries located primarily in the Global South, such as India and Singapore, that over the past three to four decades have begun to develop a strong industrial base.

**emigration:** The movement of people out of one country to settle in another.

**emotional intelligence:** The ability to identify, assess, and control the emotions of oneself or others.

**emotional loneliness:** The absence of an intimate confidant.

**empirical investigation:** Factual inquiries carried out in any area of sociological study.

**encounter:** A meeting between two or more people in a situation of face-to-face interaction. Our daily lives can be seen as a series of different encounters spread out across the course of the day. In modern societies, many of these encounters are with strangers rather than with people we know.

**entrepreneur:** The owner/founder of a business firm.

**environmental ecology:** The scientific study of the distribution and abundance of life and the interactions between organisms and their natural environment.

**environmental globalization:** The ways in which human actions have environmental impacts with planetary effects.

**environmental injustice:** The principle that the harms suffered by ecosystems today are closely linked to and mirror the harms experienced by the most marginalized human beings across the planet.

**ethnic cleansing:** The creation of ethnically homogeneous territories through the mass expulsion of other ethnic **populations**.

**ethnicity:** Cultural **values** and **norms** that distinguish the members of a given group from others. An ethnic group is one whose members share a distinct awareness of a common cultural **identity**, separating them from other groups. In virtually all **societies**, ethnic differences are associated with variations in **power** and material **wealth**. Where ethnic differences are also racial, such divisions are sometimes especially pronounced.

**ethnocentrism:** The tendency to look at other **cultures** through the eyes of one's own culture, and thereby misrepresent them.

**ethnography:** The firsthand study of people using observation, in-depth interviewing, or both. Also called *fieldwork.*

**ethnomethodology:** The study of how people make sense of what others say and do in the course of day-to-day **social interaction**. Ethnomethodology is concerned with the "ethnomethods" by which people sustain meaningful interchanges with one another.

**evangelicalism:** A form of Protestantism characterized by a belief in spiritual rebirth (being "born again").

**exchange mobility:** The exchange of positions on the socioeconomic scale such that talented people move up the economic hierarchy while the less talented move down.

**experiment:** A **research method** by which variables can be analyzed in a controlled and systematic way, either in an artificial situation constructed by the researcher or in a naturally occurring setting.

**exponential growth:** A geometric, rather than linear, rate of progression, producing a fast rise in the numbers of a **population** experiencing such

growth.

**extended family:** A **family** group consisting of more than two generations of relatives living either within the same household or very close to one another.

**external risk:** A danger that springs from the natural world and is unrelated to the actions of humans. Examples of external risk include droughts, earthquakes, famines, and storms.

**failed states:** States in which the central government has lost authority and resorts to deadly force to retain **power**.

**families of orientation:** The families into which individuals are born. Also known as *families of origin*.

**families of procreation:** The families individuals initiate through **marriage**, **cohabitation**, or by having children.

**family:** A group of individuals related to one another by blood ties, **marriage**, or adoption, who form an economic unit, the adult members of which are responsible for the upbringing of children. All known **societies** involve some form of family system, although the nature of family relationships varies widely. While the main family form in modern societies is the **nuclear family**, **extended family** relationships are also found.

**family capitalism:** Capitalistic enterprise owned and administered by entrepreneurial **families**.

**feminism:** Advocacy of the rights of women to be equal with men in all spheres of life. Feminism dates from the late eighteenth century in Europe, and feminist movements exist in most countries today.

**feminist theory:** A sociological perspective that emphasizes the centrality of **gender** in analyzing the social world and particularly the uniqueness of the experience of women. There are many strands of feminist theory, but they all share the desire to explain **gender inequality** in **society** and to work to overcome it.

**feminization of poverty:** An increase in the proportion of the poor who are female.

**fertility:** The average number of live-born children produced by women of childbearing age in a particular **society**.

**flexible production:** A manufacturing system involving a complex network of contract factories that enable both the process of production, and the product itself, to be quickly modified in order to meet changing demand and market conditions.

**focused interaction:** Interaction between individuals engaged in a common activity or in direct conversation with one another.

**food deserts:** Geographic areas where residents do not have easy access to high-quality affordable food. These regions are concentrated in rural areas and poor urban neighborhoods.

**food security:** Access to sufficient, safe, and nutritious food that meets the need for an active and healthy life.

**Fordism:** The system of production pioneered by Henry Ford, in which the assembly line was introduced.

**formal operational stage:** According to Jean Piaget's theory, a stage of cognitive development at which the growing child becomes capable of handling abstract concepts and hypothetical situations.

**formal organization:** A group that is rationally designed to achieve its objectives, often by means of explicit rules, regulations, and procedures.

**formal relations:** Relations that exist in groups and **organizations**, as laid down by the **norms**, or rules, of the official system of **authority**.

**front region:** Settings of social activity in which people seek to put on a definite "performance" for others, as specified by Erving Goffman.

**functionalism:** A theoretical perspective based on the notion that social events can best be explained in terms of the functions they perform—that is, the contributions they make to the continuity of a **society**.

**functional literacy:** Reading and writing skills that are beyond a basic level and are sufficient to manage one's everyday activities and employment tasks.

**fundamentalists:** Evangelists who are highly antimodern in many of their beliefs and adhere to strict codes of morality and conduct.

**gender:** Social expectations about behavior regarded as appropriate for the members of each **sex**. Gender refers not to the physical attributes distinguishing men and women but to socially formed traits of masculinity and femininity.

**gender binary:** The classification of **sex** and **gende**r into two discrete, opposite, and nonoverlapping forms of masculine and feminine.

**gender expression:** How a person chooses to convey **gender identity** through behavior, voice, mannerisms, and other external characteristics.

**gender gap:** The differences between women and men, especially as reflected in social, political, intellectual, cultural, or economic attainments or attitudes.

**gender identity:** How individuals see and describe their own **gender**.

**gender inequality:** The inequality between men and women in terms of **wealth**, **income**, and **status**.

**gender nonconforming:** Identifying as a **gender** other than male or female, or not identifying with a particular gender at all

**gender roles: Social roles** assigned to each **sex** and labeled as masculine or feminine.

**gender role socialization:** The learning of **gender roles** through social factors such as schooling, the media, and **family**.

**gender typing:** Women holding **occupations** of lower **status** and pay, such as secretarial and retail positions, and men holding jobs of higher status and pay, such as managerial and professional positions.

**generalized other:** A concept developed by G. H. Mead, according to which the individual comes to understand the general **values** of a given

group or **society** during the **socialization** process.

**generational equity:** The striking of a balance between the needs and interests of members of different generations.

**genocide:** The systematic, planned destruction of a racial, political, or cultural group.

**gentrification:** A process in which older, deteriorated housing and other buildings are renovated as more affluent groups move into an area.

**geoengineering:** Large-scale interventions in the earth’s natural systems to counteract climate change.

**ghetto:** A place where a racial or ethnic group initially comes to live as a consequence of systematic exclusion from more desirable places.

**Gini coefficient:** A standard measure of a country’s economic disparity, where 0 represents perfect equality (everyone has the same income) and 1 represents maximum inequality.

**glass ceiling:** A promotion barrier that prevents a woman’s upward mobility within an **organization**.

**global capitalism:** The current transnational phase of capitalism, characterized by global markets, production, and finance; a **transnational capitalist class** whose business concerns are global rather than national; and transnational systems of governance (such as the World Trade Organization) that promote global business interests.

**global city:** A city, such as London, New York, or Tokyo, that has become an organizing center of the new global **economy**.

**global commodity chains:** Worldwide **networks** of labor and production processes that extend from raw materials to the final consumer.

**global inequality:** The systematic differences in **wealth** and **power** between countries.

**globalization:** The development of social and economic relationships stretching worldwide. In current times, we are all influenced by

**organizations** and social **networks** located thousands of miles away. A key part of the study of globalization is the emergence of a world system—for some purposes, we need to regard the world as forming a single social order.

**GNI:** Gross national income, a commonly used measure based on the monetary value of a country's yearly output of goods and services.

**graying:** A term used to indicate that an increasing proportion of a **society**'s **population** is over 65.

**health:** A state of complete physical, mental, and social well-being rather than merely the absence of disease or infirmity.

**health disparities:** Inequalities in **health**, health care, and health behaviors across different racial, ethnic, and socioeconomic groups.

**health literacy:** One's capacity to obtain, process, and understand the basic health information and services needed to make appropriate health decisions.

**hegemonic masculinity:** Social **norms** dictating that men should be strong, self-reliant, and unemotional.

**hidden curriculum:** Traits of behavior or attitudes that are learned at school but not included in the formal curriculum—for example, **gender** differences.

**high-trust systems: Organizations** or **work** settings in which individuals are permitted a great deal of autonomy and control over the work task.

**homeless:** People who have no place to sleep and either stay in free shelters or sleep in public places not meant for habitation.

**housework:** Unpaid work carried out in the home, usually by women; domestic chores such as cooking, cleaning, and shopping. Also called *domestic labor*.

**human capital theory:** The argument that individuals make investments in their own "human capital" to increase their productivity and earnings.

**hunting and gathering societies: Societies** whose mode of subsistence is hunting animals, fishing, and gathering edible plants.

**hybridity:** A term adopted from biology to convey that cultures are neither wholly isolated nor entirely distinct, but instead constantly borrow from one another.

**hypotheses:** Ideas or educated guesses about a given state of affairs, put forward as bases for empirical testing.

**ideal type:** A "pure type," constructed by emphasizing certain traits of a social item that do not necessarily exist in reality. An example is Max Weber's ideal type of bureaucratic **organization**.

**identity:** The distinctive characteristics of a person's (or a group's) character that relate to who they are and what is meaningful to them. Some of the main sources of identity include **gender**, sexual orientation, nationality or **ethnicity**, and social **class**.

**ideologies:** Shared ideas or beliefs that serve to justify the interests of dominant groups. Ideologies are found in all **societies** in which there are systematic and ingrained inequalities among groups. The concept of ideology connects closely with that of **power**, since ideological systems serve to legitimize the power that groups hold.

**immigration:** The movement of people into one country from another for the purpose of settlement.

**impression management:** Preparation for the presentation of one's **social role**.

**income:** Money received from paid wages and salaries or earned from investments.

**industrialization:** The process of the machine production of goods. See also **industrialized societies**.

**industrialized societies:** Strongly developed **nation-states** in which the majority of the **population** works in factories or offices rather than in agriculture, and most people live in urban areas.

**infant mortality rate:** The number of infants who die during the first year of life, per 1,000 live births.

**influence:** The ability to affect others' behavior without coercion or other forms of direct control.

**informal economy:** Economic transactions carried on outside the sphere of orthodox paid employment.

**informal relations:** Relations that exist in groups and **organizations** developed on the basis of personal connections; ways of doing things that depart from formally recognized modes of procedure.

**information and communication technology:** Forms of **technology** based on information processing and requiring microelectronic circuitry.

**information poverty:** The state of people who have little or no access to information **technology**, such as computers.

**in-groups:** Groups toward which one feels particular loyalty and respect —the groups to which "we" belong.

**inner city:** The areas composing the central neighborhoods of a city, as distinct from the suburbs. In many modern urban settings in the developed world, inner-city areas are subject to dilapidation and decay, with the more affluent residents having moved to outlying areas.

**instincts:** Fixed patterns of behavior that have genetic origins and that appear in all normal animals within a given species.

**institutional capitalism:** Consolidated networks of business leadership in which **corporations** hold stock shares in one another, resulting in increased concentration of corporate **power**.

**institutional racism:** The idea that **racism** occurs through the respected and established institutions of **society** rather than through hateful actions of some bad people.

**intelligence:** Level of intellectual ability, particularly as measured by **IQ (intelligence quotient)** tests.

**interactional vandalism:** The deliberate subversion of the tacit rules of conversation.

**interest group:** A group organized to pursue specific interests in the political arena, operating primarily by lobbying the members of legislative bodies.

**intergenerational mobility:** Movement up or down a **social stratification** hierarchy from one generation to another.

**interlocking directorates:** Linkages among corporations created by individuals who sit on two or more boards.

**international division of labor:** The specialization in producing goods for the world market that divides regions into zones of industrial or agricultural production or high- or low-skilled labor.

**international governmental organizations (IGOs):** International organizations established by treaties between governments for purposes of conducting business between the nations making up their membership.

**international nongovernmental organizations (INGOs):** International organizations established by agreements between the individuals or private **organizations** making up their membership.

**intersectionality:** A sociological perspective that holds that our multiple group memberships affect our lives in ways that are distinct from single group memberships. For example, the experience of a Black woman may be distinct from that of a White woman or a Black man.

**intersex:** Describes individuals possessing both male and female genitalia. Although statistically rare, this subpopulation is of great interest to gender scholars.

**intragenerational mobility:** Movement up or down a **social stratification** hierarchy within the course of a personal career.

**IQ (intelligence quotient):** A score attained on tests of symbolic or reasoning abilities.

**iron law of oligarchy:** A term coined by Max Weber's student Robert Michels meaning that large **organizations** tend toward centralization of **power**, making **democracy** difficult.

**kinship:** A relation that links individuals through blood ties, **marriage**, or adoption. Kinship relations are by definition part of marriage and **family**, but they extend much more broadly. While in most modern societies few social obligations are involved in kinship relations extending beyond the immediate family, in other **cultures** kinship is of vital importance to social life.

**knowledge economy:** A **society** based primarily no longer on the production of material goods but instead on the production of knowledge. Its emergence has been linked to the development of a broad base of consumers who are technologically literate and have made new advances in the computing, entertainment, and telecommunications part of their lives.

**Kuznets curve:** A formula showing that inequality increases during the early stages of capitalist development, then declines, and eventually stabilizes at a relatively low level; advanced by the economist Simon Kuznets.

**labeling theory:** An approach to the study of **deviance** that suggests that people become "deviant" because certain labels are attached to their behavior by political authorities and others.

**labor unions: Organizations** that advance and protect the interests of workers with respect to working conditions, wages, and benefits.

**language:** The primary vehicle of meaning and communication in a **society**, language is a system of **symbols** that represent objects and abstract thoughts.

**latent functions:** Functional consequences that are not intended or recognized by the members of a social system in which they occur.

**laws:** Rules of behavior established by a political **authority** and backed by state **power**.

**legitimation crisis:** The failure of a political order to be able to govern properly because it did not generate a sufficient level of commitment and involvement on the part of its **citizens**.

**liberal democracy:** A type of representative **democracy** in which elected representatives hold power.

**liberal feminism:** The form of **feminist theory** that posits that **gender inequality** is produced by unequal access to **civil rights** and certain social resources, such as education and employment, based on **sex**. Liberal feminists tend to seek solutions through changes in legislation that ensure that the rights of individuals are protected.

**liberation theology:** An activist Catholic **religious movement** that combines Catholic beliefs with a passion for social justice for the poor.

**life chances:** A term introduced by Max Weber to signify a person's opportunities for achieving economic prosperity.

**life course:** The various transitions and stages people experience during their lives.

**life expectancy:** The number of years the average person can expect to live.

**life span:** The maximum length of life that is biologically possible for a member of a given species.

**linguistic relativity hypothesis:** A **hypothesis**, based on the **theories** of Edward Sapir and Benjamin Lee Whorf, that perceptions are relative to **language**.

**lobbying:** The act of persuading influential officials to vote in favor of a cause or otherwise lend support to the aims of an **interest group**.

**local nationalism:** The belief that communities that share a cultural **identity** should have political autonomy, even within smaller units of **nation-states**.

**looking-glass self:** According to Charles Horton Cooley's **theory**, the reactions we elicit in social situations create a mirror in which we see

ourselves.

**lower class:** A social class comprising those who work part-time or not at all and whose household income is typically lower than $31,000 a year.

**low-trust systems:** Organizational or **work** settings in which people are allowed little responsibility for, or control over, the work task.

**macrosociology:** The study of large-scale groups, **organizations**, or social systems.

**Malthusianism:** A doctrine about **population** dynamics developed by Thomas Malthus, according to which population increase comes up against "natural limits," represented by famine and war.

**managerial capitalism:** Capitalistic enterprise administered by managerial executives rather than by owners.

**manifest functions:** The functions of a type of social activity that are known to and intended by the individuals involved in the activity.

**manufactured risk:** A danger that is created by the impact of human knowledge and **technology** on the natural world. Examples of manufactured risk include global warming and genetically modified foods.

**marriage:** A socially approved sexual relationship between two individuals. Marriage historically has involved two persons of opposite sexes, but in the past decade marriage between same-sex partners has been legalized in a growing number of states and nations throughout the world. Marriage normally forms the basis of a **family of procreation**—that is, it is expected that the married couple will produce and bring up children.

**Marxism:** A body of thought deriving its main elements from the ideas of Karl Marx.

**mass media:** Forms of communication, such as newspapers, magazines, radio, and television, designed to reach mass audiences.

**master status:** A single **identity** or **status** that overpowers all the other identities one holds.

**material culture:** The physical objects that a **society** creates that influence the ways in which people live.

**materialist conception of history:** The view developed by Karl Marx according to which material, or economic, factors have a prime role in determining historical change.

**matrilocal:** Describes a **family** system in which the husband is expected to live near the wife's parents.

**mean:** A statistical measure of central tendency, or average, based on dividing a total by the number of individual cases.

**means of production:** The means whereby the production of material goods is carried on in a **society**, including not just **technology** but also the social relations between producers.

**measures of central tendency:** Ways of calculating averages.

**median:** The number that falls halfway in a range of numbers; a way of calculating central tendency that is sometimes more useful than calculating a **mean**.

**Medicare:** A program under the U.S. **Social Security** Administration that reimburses hospitals and physicians for medical care provided to qualifying people over 65 years old.

**megacities:** A term favored by Manuel Castells to describe large, intensely concentrated urban spaces that serve as connection points for the global **economy**.

**megalopolis:** The "city of all cities" in ancient Greece; used in modern times to refer to very large **conurbations**.

**melting pot:** The idea that ethnic differences can be combined to create new patterns of behavior drawing on diverse cultural sources.

**microsociology:** The study of human behavior in the context of face-to-face interaction.

**middle class:** A social **class** composed broadly of those working in white-collar and lower managerial **occupations**.

**minority group:** A group of people in a given **society** who, because of their distinct physical or cultural characteristics, find themselves in situations of inequality compared with the dominant group within that society.

**mode:** The number that appears most often in a given set of data. This can sometimes be a helpful way of portraying central tendency.

**modernization theory:** A version of **neoliberal** development theory that argues that low-income societies develop economically only if they give up their traditional ways and adopt modern economic institutions, **technologies**, and cultural **values** that emphasize savings and productive investment.

**monarchy:** A system of government in which an unelected king or queen rules.

**monogamy:** A form of **marriage** in which each married partner is allowed only one spouse at any given time.

**monopoly:** The domination by a single firm in a given industry.

**monotheism:** Belief in a single god.

**mortality:** The number of deaths in a **population**.

**multiculturalism:** A condition in which ethnic groups exist separately and share equally in economic and political life.

**nation:** People with a common identity that ideally includes shared culture, language, and feelings of belonging.

**nationalism:** A set of beliefs and **symbols** expressing identification with a national community.

**nation-states:** Particular types of **states**, characteristic of the modern world, in which governments have sovereign **power** within defined territorial areas, and **populations** are **citizens** who know themselves to be part of single nations.

**nations without states:** Instances in which the members of a nation lack political **sovereignty** over the area they claim as their own.

**neoliberalism:** The economic belief that free-market forces, achieved by minimizing government restrictions on business, provide the only route to economic growth.

**networks:** Sets of informal and formal social ties that link people to each other.

**New Age movement:** A general term to describe the diverse spectrum of beliefs and practices oriented on inner spirituality. Paganism, Eastern mysticism, shamanism, alternative forms of healing, and astrology are all examples of New Age activities.

**new religious movements:** The broad range of religious and spiritual groups, **cults**, and **sects** that have emerged alongside mainstream **religions**. New religious movements range from spiritual and self-help groups within the **New Age movement** to exclusive sects such as the Hare Krishnas.

**new social movements:** A set of **social movements** that have arisen in Western **societies** since the 1960s in response to the changing risks facing human societies. New social movements differ from earlier social movements in that they focus on a range of human rights as opposed to economic concerns, and thus draw support from across **class** lines.

**nonmaterial culture:** Cultural ideas that are not themselves physical objects.

**nonverbal communication:** Communication between individuals based on facial expression or bodily gesture rather than on **language**.

**norms:** Rules of conduct that specify appropriate behavior in a given range of social situations. A norm either prescribes a given type of behavior or forbids it. All human groups follow definite norms, which are always backed by **sanctions** of one kind or another, varying from informal disapproval to physical punishment.

**nuclear family:** A **family** group consisting of two adults and dependent children.

**obesity:** Excessive body weight, indicated by a **body mass index (BMI)** over 30.

**occupation:** Any form of paid employment in which an individual regularly works.

**old:** Sociological term for persons age 75 to 84.

**old-age dependency ratio:** The number of people ages 65 and older, divided by the number of persons ages 18 to 64.

**older adults:** Adults ages 65 and older.

**oldest old:** Sociological term for persons age 85 and older.

**oligarchy:** Rule by a small minority within an **organization** or **society**.

**oligopoly:** The domination by a small number of firms in a given industry.

**organic solidarity:** According to Émile Durkheim, the social cohesion that results from the various parts of a **society** functioning as an integrated whole.

**organization:** A large group of individuals with a definite set of **authority** relations. Many types of organizations exist in **industrialized societies**, influencing most aspects of our lives. While not all organizations are bureaucratic, there are close links between the development of organizations and bureaucratic tendencies.

**out-groups:** Groups toward which one feels antagonism and contempt —“those people.”

**outsourcing:** A business practice that sends production of materials to factories around the world. The components of one final product often originate from many different countries and then are sent elsewhere to be put together and sold. Factories from different countries must compete with one another to obtain business.

**pariah groups:** Groups who suffer from negative **status discrimination** —they are looked down on by most other members of **society**.

**participant observation:** A method of research widely used in sociology and anthropology in which the researcher takes part in the activities of the group or community being studied.

**participatory democracy:** A system of **democracy** in which all members of a group or community participate collectively in making major decisions.

**pastoral societies: Societies** whose subsistence derives from the rearing of domesticated animals.

**patriarchy:** The dominance of men over women. All known **societies** are patriarchal, although there are variations in the degree and nature of the **power** that men exercise as compared with women. One of the prime objectives of women's movements in modern societies is to combat existing patriarchal institutions.

**patrilocal:** Describes a **family** system in which the wife is expected to live near the husband's parents.

**peer group:** A group composed of individuals of similar age and social **status**.

**peripheral countries:** According to **world-systems theory**, countries that have a marginal role in the world **economy** and are thus dependent on the **core countries** for their trading relationships.

**personality stabilization:** According to the theory of **functionalism**, the **family** plays a crucial role in assisting its adult members emotionally. **Marriage** is the arrangement through which personalities are supported and kept healthy.

**personal space:** The physical space individuals maintain between themselves and others.

**pilot study:** A trial run in **survey** research.

**pluralism:** A model for ethnic relations in which all ethnic groups in the United States retain their independent and separate identities yet share equally in the rights and **powers** of citizenship.

**pluralist theories of modern democracy:** Theories that emphasize the role of diverse or potentially competing interest groups, none of which dominate the political process.

**political globalization:** The growing **influence** of international governmental institutions that enact—and seek to enforce—**laws** and regulations that are binding on the countries that ratify them.

**political rights:** Rights of political participation, such as the right to vote in local and national elections, held by **citizens** of a national community.

**polyandry:** A form of **marriage** in which a woman may simultaneously have two or more husbands.

**polygamy:** A form of **marriage** in which a person may have two or more spouses simultaneously.

**polygyny:** A form of marriage in which a man may simultaneously have two or more wives.

**polytheism:** Belief in two or more gods.

**population:** The people who are the focus of social research.

**population aging:** The relatively faster growth of the older **population** compared to the younger population and the resulting shifts in the age distribution of the population toward older ages. Population aging is commonly measured as an increasing **median** age or a rising share of the population above a certain age, such as 65.

**populism:** The belief that politics should reflect the needs and interests of ordinary people rather than those of elite individuals or groups.

**post-Fordism:** The period characterized by the transition from mass industrial production, using Fordist methods, to more flexible forms of production favoring innovation and aimed at meeting market demands for customized products.

**postindustrial society:** A notion advocated by those who believe that processes of **social change** are taking us beyond the industrialized order. A postindustrial society is based on the production of information rather

than the production of material goods. According to postindustrialists, we are currently experiencing a series of social changes as profound as those that initiated the industrial era some 200 years ago.

**postmodern feminism:** The feminist perspective that challenges the idea of a unitary basis of **identity** and experience shared by all women. Postmodern feminists reject the claim that a grand theory can explain the position of women in **society,** or that there is any single, universal essence or category of “woman.” Instead, postmodern feminism encourages the acceptance of many different standpoints as equally valid.

**postmodernism:** The belief that **society** is no longer governed by history or progress. Postmodern society is highly pluralistic and diverse, with no “grand narrative” guiding its development.

**poverty line:** An official government measure to define those living in poverty in the United States.

**power:** The ability of individuals or the members of a group to achieve aims or further the interests they hold. Power is a pervasive element in all human relationships. Many conflicts in **society** are struggles over power, because the amount of power an individual or group holds governs its ability to put its wishes into practice.

**power elite:** Small **networks** of individuals who, according to C. Wright Mills, hold concentrated **power** in modern **societies**.

**prejudice:** The holding of preconceived ideas about an individual or group, ideas that are resistant to change even in the face of new information. Prejudice may be either positive or negative.

**preoperational stage:** A stage of cognitive development, in Jean Piaget’s theory, in which the child has advanced sufficiently to master basic modes of logical thought.

**primary deviation:** According to Edwin Lemert, the actions that cause others to label one as a deviant.

**primary groups:** Groups characterized by intense emotional ties, face-to-face interaction, intimacy, and a strong, enduring sense of

commitment.

**primary socialization:** The process by which children learn the cultural **norms** and expectations for behavior of the **society** into which they are born. Primary socialization occurs largely in the **family**.

**procreative technology:** Techniques for influencing the human reproductive process.

**profane:** That which belongs to the mundane, everyday world.

**proletariat:** People who sell their labor for wages, according to Marx.

**qualitative methods:** Approaches to sociological research that often rely on personal and/or collective interviews, accounts, or observations of a person or situation.

**quantitative methods:** Approaches to sociological research that draw on objective and statistical data and often focus on documenting trends, comparing subgroups, or exploring correlations.

**race:** A socially constructed category rooted in the belief that there are fundamental differences among humans, associated with phenotype and ancestry.

**race socialization:** The specific verbal and nonverbal messages that older generations transmit to younger generations regarding the meaning and significance of race.

**racial microaggressions:** Small slights, indignities, or acts of disrespect that are hurtful to people of color even though they are often perpetuated by well-meaning Whites.

**racism:** The attribution of characteristics of superiority or inferiority to a **population** sharing certain physically inherited characteristics. Racism is one specific form of **prejudice**, focusing on physical variations among people. Racist attitudes became entrenched during the period of Western colonial expansion, but seem also to rest on mechanisms of prejudice and **discrimination** found in human **societies** today.

**radical feminism:** The form of **feminist theory** that posits that **gender inequality** is the result of male domination in all aspects of social and economic life.

**random sampling:** A **sampling** method in which a sample is chosen so that every member of the **population** has the same probability of being included.

**rape:** The forcing of nonconsensual vaginal, oral, or anal intercourse.

**rates of population growth or decline:** A measurement of **population** change calculated by subtracting the yearly number of deaths per 1,000 from the number of births per 1,000.

**rational choice approach:** More broadly, the theory that an individual's behavior is purposive. Within the field of criminology, rational choice analysis argues that deviant behavior is a rational response to a specific social situation.

**rationalization:** A concept used by Max Weber to refer to the process by which modes of precise calculation and organization, involving abstract rules and procedures, increasingly come to dominate the social world.

**reference group:** A group that provides a standard for judging one's attitudes or behaviors.

**regionalization:** The division of social life into different regional settings or zones.

**relative deprivation:** Deprivation one feels by comparing oneself with a group.

**relative poverty:** Poverty defined according to the living standards of the majority in any given society.

**religion:** A set of beliefs adhered to by the members of a community, incorporating **symbols** regarded with a sense of awe or wonder together with ritual practices. Religions do not universally involve a belief in supernatural entities.

**religious economy:** A theoretical framework within the sociology of **religion** that argues that religions can be fruitfully understood as **organizations** in competition with one another for followers.

**religious movements:** Associations of people who join together to seek to spread a new **religion** or to promote a new interpretation of an existing religion.

**religious nationalism:** The linking of strongly held religious convictions with beliefs about a people's social and political destiny.

**representative democracy:** A form of **democracy** in which **citizens** elect to governing bodies representatives who then vote on **laws** and policies.

**representative sample:** A sample from a larger **population** that is statistically typical of that population.

**research methods:** The diverse methods of investigation used to gather empirical (factual) material. Different research methods exist in sociology, but the most commonly used are fieldwork (or **participant observation**) and **survey** methods. For many purposes, it is useful to combine two or more methods within a single research project.

**resocialization:** The process whereby people learn new rules and **norms** upon entering a new social world.

**response cries:** Seemingly involuntary exclamations individuals make when, for example, they are taken by surprise, drop something inadvertently, or want to express pleasure.

**revolutions:** Processes of political change involving the mobilizing of a mass **social movement**, which, by the use of violence, successfully overthrows an existing regime and forms a new government.

**roles:** The expected behaviors of people occupying particular **social positions**. The idea of **social role** originally comes from the theater, referring to the parts that actors play in a stage production. In every **society**, individuals play a number of **social roles**.

**sacred:** That which inspires attitudes of awe or reverence among believers in a given set of religious ideas.

**sample:** A small proportion of a larger **population**.

**sampling:** Studying a proportion of individuals or cases from a larger **population** as representative of that population as a whole.

**sanction:** A mode of reward or punishment that reinforces socially expected forms of behavior.

**scapegoats:** Individuals or groups blamed for wrongs that were not of their doing.

**scientific racism:** The use of scientific research or data to justify or reify beliefs about the superiority or inferiority of particular racial groups. Much of the "data" used to justify such claims is flawed or biased.

**secondary deviation:** According to Edwin Lemert, following the act of **primary deviation**, secondary deviation occurs when an individual accepts the label of deviant and acts accordingly.

**secondary groups:** Groups characterized by large size and by impersonal, fleeting relationships.

**second demographic transition:** A new demographic model that predicts that **fertility** rates will continue to fall because of shifts in **family** structure.

**sects: Religious movements** that break away from orthodoxy.

**secularization:** A process of decline in the influence of **religion**. Although modern **societies** have become increasingly secularized, tracing the extent of secularization is a complex matter. Secularization can refer to levels of involvement with religious **organizations** (such as rates of **church** attendance), the social and material influence wielded by religious organizations, and the degree to which people hold religious beliefs.

**secular thinking:** Worldly thinking, particularly as seen in the rise of **science**, **technology**, and rational thought in general.

**segregation:** The practice of keeping racial and ethnic groups physically separate, thereby maintaining the superior position of the dominant group.

**self-consciousness:** Awareness of one's distinct **social identity** as a person separate from others. Human beings are not born with self-consciousness but acquire an awareness of self as a result of early **socialization**. The learning of **language** is of vital importance to the processes by which a child learns to become a self-conscious being.

**self-identity:** The ongoing process of self-development and definition of our personal **identity** through which we formulate a unique sense of ourselves and our relationship to the world around us.

**semiotics:** The study of the ways in which nonlinguistic phenomena can generate meaning, as in the example of a traffic light.

**semiperipheral countries:** According to **world-systems theory**, countries that supply sources of labor and raw materials to the **core countries** and the world **economy** while at the same time profiting by extracting labor and raw materials from **peripheral countries**, but are not themselves fully **industrialized societies**.

**sensorimotor stage:** According to Jean Piaget, a stage of human cognitive development in which a child's awareness of their environment is dominated by perception and touch.

**sex:** The biological and anatomical differences distinguishing females and males.

**sex segregation:** The concentration of men and women in different **occupations**.

**sexual and gender minority (SGM):** The broad label applied to **populations** that include, but are not limited to, individuals who identify as lesbian, gay, bisexual, asexual, **transgender**, queer, and/or **intersex**.

**sexual harassment:** Unwanted sexual advances by one individual toward another, in which the first person persists even though it is clear that the other party is resistant.

**sexual orientation:** An individual's enduring emotional, romantic, or sexual attraction to other people.

**shaming:** A way of punishing criminal and deviant behavior based on rituals of public disapproval rather than incarceration. The goal of shaming is to maintain the ties of the offender to the community.

**sick role:** A term used by the functionalist Talcott Parsons to describe the patterns of behavior that a sick person adopts to minimize the disruptive impact of their illness on others.

**signifier:** Any vehicle of meaning and communication.

**slavery:** A form of **social stratification** in which some people are owned by others as property.

**social aggregate:** A simple collection of people who happen to be together in a particular place but do not significantly interact or identify with one another.

**social aging:** The **norms**, **values**, and **roles** that are culturally associated with a particular chronological age.

**social capital:** The relational **networks** that provide a person with tangible resources (such as **wealth**) and intangible ones (such as personal connections).

**social category:** People who share a common characteristic (such as **gender** or **occupation**) but do not necessarily interact or identify with one another.

**social change:** Alteration in basic structures of a **social group** or **society**. Social change is an ever-present phenomenon in social life but has become especially intense in the modern era. The origins of modern sociology can be traced to attempts to understand the dramatic changes shattering the traditional world and promoting new forms of social order.

**social constraint:** The conditioning influence on our behavior of the groups and **societies** of which we are members. Social constraint was regarded by Émile Durkheim as one of the distinctive properties of **social facts**.

**social construction:** An idea or practice that a group of people agree exists. It is maintained over time by people taking its existence for granted.

**social construction of gender:** The learning of **gender roles** through **socialization** and interaction with others.

**social epidemiology:** The study of the distribution and incidence of disease and illness within a **population**.

**social facts:** According to Émile Durkheim, the aspects of social life that shape our actions as individuals. Durkheim believed that social facts could be studied scientifically.

**social gerontology:** The study of **aging** and older adults.

**social group:** A collection of people who regularly interact with one another on the basis of shared expectations concerning behavior and who share a sense of common **identity**.

**social identity:** The characteristics that are attributed to an individual by others.

**social interaction:** The process by which we act and react to those around us.

**socialization:** The social processes through which children develop an awareness of social **norms** and **values** and achieve a distinct sense of self. Although socialization processes are particularly significant in infancy and childhood, they continue to some degree throughout life. No individuals are immune from the reactions of others around them, which influence their behavior at all phases of the **life course**.

**socialization of nature:** The process by which we control phenomena regarded as “natural, “ such as reproduction.

**social loneliness:** The absence of a broader social **network**.

**social mobility:** Movement of individuals or groups between different **social positions**.

**social movement:** Large groups of people who seek to accomplish, or to block, a process of **social change**. Social movements normally exist in conflict with **organizations** whose objectives and outlook they oppose. However, movements that successfully challenge **power**, once they become institutionalized, can develop into organizations.

**social position:** The **social identity** an individual has in a given group or **society**. Social positions may be general in nature (those associated with **gender roles**) or more specific (occupational positions).

**social reproduction:** The process of perpetuating **values**, **norms**, and social practices through **socialization**, which leads to structural continuity over time.

**social rights:** Rights of social and welfare provision held by all **citizens** in a national community, including, for example, the right to claim unemployment benefits and sickness payments provided by the **state**.

**social roles:** Socially defined expectations of an individual in a given **status** or **social position**.

**Social Security:** A federal program in the United States that provides retirement benefits and disability income to qualified people and their spouses, children, and survivors.

**social self:** The basis of **self-consciousness** in human individuals, according to the theory of G. H. Mead. The social self is the **identity** conferred upon an individual by the reactions of others. A person achieves self-consciousness by becoming aware of this **social identity**.

**social stratification:** The existence of **structured inequalities** between groups in **society** in terms of their access to material or symbolic rewards. While all societies involve some forms of stratification, only with the development of state-based systems did wide differences in **wealth** and **power** arise. The most distinctive form of stratification in modern societies is **class** divisions.

**social structure:** The underlying regularities or patterns in how people behave in their relationships with one another.

**society:** A group of people who live in a particular territory, are subject to a common system of political **authority**, and are aware of having a distinct **identity** from other groups. Some societies, such as **hunting and gathering societies**, are small, numbering no more than a few dozen people. Others are large, numbering millions. Modern Chinese society, for instance, has a **population** of more than a billion people.

**sociobiology:** An approach that attempts to explain the behavior of both animals and human beings in terms of biological principles.

**socioemotional selectivity theory:** The theory that adults maintain fewer relationships as they age, but that those relationships are of higher quality.

**sociological imagination:** The application of imaginative thought to the asking and answering of sociological questions. People who use the sociological imagination "think themselves away" from the familiar routines of daily life.

**sociology of the body:** A field that focuses on how our **health** and illness are affected by social and cultural influences.

**sovereignty:** The undisputed political rule of a **state** over a given territorial area.

**standard deviation:** A way of calculating the spread of a group of numbers.

**standardized testing:** A system in which all students take the same test under the same conditions.

**state:** A political apparatus (government institutions plus civil service officials) ruling over a given territorial order, whose **authority** is backed by **law** and the ability to use force.

**status:** The social honor or prestige that a particular group is accorded by other members of a **society**. Status groups normally display distinct styles of life—patterns of behavior that the members of a group follow. Status privilege may be positive or negative.

**stepfamily:** A **family** in which at least one partner has children from a previous **marriage**, living either in the home or nearby.

**stereotype promise:** A phenomenon where being viewed through the lens of a positive stereotype may lead one to perform in such a way that confirms the positive stereotype, thereby enhancing performance.

**stereotype threat:** The idea that when African American students believe they are being judged not as individuals but as members of a negatively stereotyped **social group**, they will do worse on tests.

**stereotyping:** Thinking in terms of fixed and inflexible categories.

**stigma:** Any physical or social characteristic that is labeled by **society** as undesirable.

**strike:** A temporary stoppage of **work** by a group of employees in order to express a grievance or enforce a demand.

**structural mobility:** Mobility resulting from changes in the number and kinds of jobs available in a **society**.

**structural strain:** Tension that produces conflicting interests within **societies**.

**structured inequalities:** Social inequalities that result from patterns in the **social structure**.

**subcultures: Values** and **norms** held by a group within a wider **society** that are distinct from those of the majority.

**suburbanization:** The development of suburbia—areas of housing outside **inner cities**.

**surplus value:** In Marxist theory, the value of a worker’s labor **power** left over when an employer has repaid the cost of hiring the worker.

**surveillance:** The supervising of the activities of some individuals or groups by others in order to ensure compliant behavior.

**survey:** A method of sociological research in which questionnaires are administered to the **population** being studied.

**sustainable development:** Development that meets the needs of the present without compromising the ability of future generations to meet their own needs.

**symbol:** One item used to stand for or represent another, as in the case of a flag symbolizing a nation.

**symbolic interactionism:** A theoretical approach in sociology developed by George Herbert Mead that emphasizes the role of **symbols** and **language** as core elements of all human interaction.

**Taylorism:** A set of ideas, also referred to as *scientific management*, developed by Frederick Winslow Taylor, involving simple, coordinated operations in industry.

**technology:** The application of scientific knowledge of the material world to production, involving the creation of material instruments (such as machines) used in human interaction with nature.

**theism:** A belief in one or more supernatural deities.

**time-space:** When and where events occur.

**timetables:** The means by which **organizations** regularize activities across time and space.

**total institutions:** Groups that exercise control over their members by making them subsume their individual **identities** in that of the group, compelling them to adhere to strict ethical codes or rules, and sometimes forcing them to withdraw from activity in the outside world.

**tracking:** Dividing students into groups that receive different instruction on the basis of assumed similarities in ability or attainment.

**transgender:** Identifying as or expressing a **gender** identity that differs from a person’s **sex** at birth.

**transnational capitalist class:** A social class whose economic interests are global rather than national, who share a globalizing perspective and similar lifestyles, and who see themselves as cosmopolitan citizens of the world.

**transnational (or multinational) corporations:** Business **corporations** located in two or more countries.

**transnational feminism:** A branch of **feminist theory** that highlights the way that global processes—including **colonialism**, **racism**, and imperialism—shape **gender** relations and hierarchies.

**triad:** A group consisting of three persons.

**underclass:** A **class** of individuals situated at the bottom of the class system, normally composed of people from **ethnic minority** backgrounds.

**unemployment rate:** The proportion of the **population** 16 and older that is actively seeking work but is unable to find employment.

**unfocused interaction:** Interaction occurring among people present in a particular setting but not engaged in direct face-to-face communication.

**union density:** A statistic that represents the number of union members as a percentage of the number of people who could potentially be union members.

**upper class:** A social **class** broadly composed of the more affluent members of **society**, especially those who have inherited **wealth**, own businesses, or hold large numbers of stocks (shares).

**urbanism:** A term used by Louis Wirth to denote distinctive characteristics of urban social life, such as its impersonality.

**urbanization:** The movement of the **population** into towns and cities and away from rural areas.

**urban renewal:** The process of renovating deteriorating neighborhoods by using public funds to renew old buildings and construct new ones, often through large-scale demolition of slum housing.

**vaccine hesitancy:** The reluctance or refusal to have oneself or one's children vaccinated.

**values:** Ideas held by individuals or groups about what is desirable, proper, good, and bad. What individuals value is strongly influenced by

the specific **culture** in which they happen to live.

**wealth:** Money and material possessions held by an individual or group.

**welfare capitalism:** The practice by which large **corporations** protect their employees from the fluctuations of the market.

**welfare state:** A political system that provides a wide range of welfare benefits for its **citizens**.

**white-collar crime:** Criminal activities carried out by those in white-collar, or professional, jobs.

**White privilege:** The unacknowledged and unearned assets that benefit Whites in their everyday lives.

**work:** The activity by which people produce from the natural world and so ensure their survival. Work should not be thought of exclusively as paid employment. In traditional **cultures**, there was only a rudimentary monetary system, and few people worked for money. In modern **societies**, there remain types of work that do not involve direct payment (e.g., housework).

**working class:** A social **class** broadly composed of people working in blue-collar, or manual, **occupations**.

**working poor:** People who work but whose earnings are not enough to lift them above the **poverty line**.

**world-accommodating movements: Religious movements** that emphasize the importance of inner religious life and spiritual purity over worldly concerns.

**world-affirming movements: Religious movements** that seek to enhance followers' ability to succeed in the outside world by helping them unlock their human potential.

**world-rejecting movements: Religious movements** that are exclusive in nature, highly critical of the outside world, and demanding of their members.

**world-systems theory:** Pioneered by Immanuel Wallerstein, this **theory** emphasizes the interconnections among countries based on the expansion of a capitalist world **economy**. This economy is made up of **core**, **semiperipheral**, and **peripheral countries**.

**young old:** Sociological term for persons age 65 to 74.

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# FIGURES

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